

**JOINT SELECTBOARD, and BOARD OF HEALTH  
MEETING NOTICE**

**Due to COVID-19 Public Participation will be by:**

Join Zoom Meeting: <https://zoom.us/j/98981741610>

**Meeting ID: 989 8174 1610 Password: 715761**

**Dial into meeting: +1 646 558 8656 or +1 312 626 6799 or +1 301 715 8592**

**Monday, November 16, 2020**

Topics may start earlier than specified, unless there is a hearing scheduled

**Meeting Being Taped**

**Votes May Be Taken**

1. 6:30 PM Selectboard Chair opens the meeting, including announcing that the meeting is being recorded and roll call taken
2. 6:30 Board of Health Chair opens the meeting, roll call taken
3. 6:31 Approve Minutes:
  - Joint Selectboard and Board of Health, November 9, 2020
4. 6:32 Public Comment Period: Individuals will be limited to two (2) minutes each and the Selectboard will strictly adhere to time allotted for public comment
5. 6:35 COVID-19 Updates and Action Items
  - Review of any Updated State Guidance or Orders
  - Board of Health Update: Signage and Communication
6. 6:45 Review Final Draft of the Collins Center Assessment of Montague Human Resources Procedures and Policies
7. 7:00 Town Administrators Report
  - MIIA Insurance Participation in FY22 – FY23: Authorize the Town Administrator to sign agreement to continue Montague's participation in the MIIA Property, Liability and Workers Compensation programs in FY22 and FY23
  - Execute an agreement with MA DEP for an \$8,400 Sustainable Materials Recovery Program Recycling Dividends Program Grant
  - Execute Agreement for Library Buildings Assessment with PCA360, LLC in the sum of \$9,000
  - Topics not anticipated in 48 hour posting

**Upcoming Meetings:**

- Selectboard Meeting, **MONDAY, November 23, 2020, 6:30 PM** via Zoom

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**THE EDWARD J. COLLINS, JR.  
CENTER FOR PUBLIC MANAGEMENT**

**MCCORMACK GRADUATE SCHOOL  
OF POLICY AND GLOBAL STUDIES**

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## **HUMAN RESOURCES REVIEW MONTAGUE, MASSACHUSETTS**

**EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT**

**MARCH 2020**



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## **INTRODUCTION**

With the support of a Community Compact grant, the Town of Montague engaged the Collins Center for Public Management to conduct a human resource review (Review). The Review was commissioned to document the current state of the town's human resources systems, staffing, policies, and practices. The purpose of the Review is also to identify areas of deficit, policies to be adopted, and provide recommendations for improvement.

## **METHODOLOGY**

The methodology utilized included interviews with key personnel, including the Town Administrator, Executive Assistant, Treasurer/Collector, Treasurer's Clerk, Police Chief, Public Works Director, Water Pollution Control Director, Recreation Director, and Library Director. In addition to the interviews, there was an extensive review of existing policies and procedures, by-laws and collective bargaining agreements.

## **SUMMARY OF FINDINGS AND RECOMMENDATIONS**

As municipalities and human resources issues have grown more complex, the responsibilities of town administration have also changed, expanded, and had to adjust to increasing federal and state compliance demands. As such, many municipalities have encountered difficulties in keeping up with the legal requirements of employment, benefit, and labor laws in the fast-changing human resources landscape.

The Collins Center's primary recommendations are to:

1. Expand the job description of the thirty-hour Executive Assistant position to include the functions of a Human Resources Coordinator.
2. Create a Department Assistant position for the Selectboard/TA Office
3. Centralize all recruitment and selection processes to the Selectboard/TA Office and create an onboarding checklist that follows a clearly defined process

4. Amend the By-laws to designate the Selectboard as the appointing authority for all positions
5. Amend the By-laws to remove personnel policies from the By-law and designate the Selectboard as the promulgating authority for policies. Adopt an updated comprehensive set of personnel policies
6. Address findings and recommendations articulating human resource compliance issues contained within this Report

## **ORGANIZATIONAL STRUCTURE**

The Town of Montague has a three member Selectboard which is the policy-making arm of town government, except as otherwise directed by state statutes. The Town of Montague Consolidated Personnel By-laws, effective July 1, 2001, consists of "regulations providing for the administration of personnel including the compensation schedule and classification plan, and the establishment of a personnel board to administer these provisions pursuant to General Laws, Chapter 41, Section 108C as amended" and in accordance of Sections 108 and 108A of Chapter 41. The Selectboard serves as the Personnel Board.

Town Administrator's position description, adopted in 2013 describes the duties of the Town Administrator as follows:

Position provides professional management, administrative, and supervisory functions for the Town of Montague. Responsibilities include coordinating the activities of the Board of Selectmen and town departments, acting as Personnel Director, developing long and short range plans, developing and administering budgets, overseeing economic development plans, providing staff assistance to the Board of Selectmen, and performing a variety of complex administrative and managerial functions to operations to ensure compliance with permit regulations; supervising, training and assigning staff; preparing and administering department budget; developing and implementing policies and procedures; allocating funds, staff and equipment to provide for efficient operations; and performing a variety of supervisory and management functions for the town.

As the Personnel Director, the Town Administrator manages either directly, or through subordinate personnel, all staff under the jurisdiction of the Selectboard and coordinates with

town departments, boards and commissions and elected officials not under the jurisdiction of the Selectboard. Responsibilities highlighted in the position description include recruitment, selection, and promotion; discipline and evaluation; personnel file maintenance and collective bargaining.

## **HUMAN RESOURCES FUNCTIONS**

The term human resources is broad and includes a host of functions. Human resource functions can be characterized as transactional or strategic. According to the Society for Human Resources Management (SHRM), human resources have evolved through the years from “personnel” administration to “human resources” management.

Personnel administration is the title formerly assigned to human resources duties. In the 1980s, personnel administration consisted of enrolling employees in benefit plans, processing and distributing paychecks, hiring, suspending, and firing employees. The personnel department was merely an administrative function of the business. Concepts such as human capital or human resource management later emerged as HR began to play a bigger role in the strategic direction of the organization. Personnel administration matured into human resources, which evolved in two separate but connected ways -- strategic and transactional or functional HR.

Transactional human resources are the “traditional” functions of benefits administration, policy development and administration, position descriptions, payroll, workers compensation, personnel file maintenance, collective bargaining administrations, vacancy posting, and collecting applications and resumes. According to SHRM, these “transactional” functions are a way of “managing the employment relationship from recruitment and processing employees through retirement.”

On the other hand, strategic human resource functions deal with the strategic direction of the organization and include long term goals. According to SHRM “HR needs to be approached from

a holistic point of view encompassing every function of human capital management” and that leadership in partnership with the human resources director should work towards “creating an effective human resources infrastructure that supports an employee-centric, service-oriented strategic human resources organization.” The human resources professional should be a strategic partner with the organizational leadership. Strategic functions include long term planning, employee relations, training, succession planning, customer service, and talent retention and development.

Montague, like many towns, does a fairly good job at the transactional human resource functions. Benefits are administered by the Treasurer/Collector’s office, payroll and leave are administered by the Town Accountant, and employee and labor relations and some recruitment are administered by the Town Administrator’s office. Personnel files are contained in various locations.

While human resource functions are being performed, they are not sufficiently centralized, coordinated, or consistent. Personnel files may not in all cases be in proper form and are located in various departments across the Town. Individual departments are responsible for the recruitment of personnel but do not have policy or procedure to follow which results in inconsistent practices.

Since the time the current Town Administrator was hired in 2016, significant efforts have been made to address the strategic aspects of personnel administration, including this Review. The implementation of recommendations contained herein, along with the adoption of new and revised comprehensive personnel policies, will build on a solid foundation and move the town toward its goal of not only being compliant but strategic.

For the most part, the town’s personnel systems work. In small to mid-size towns, human resources functions are often shared by different offices, as is the case in Montague. A challenge in Montague is the fact that the Selectboard/TA office is understaffed for the work

being performed. The staff assigned to the office is the full time Town Administrator and the part time, 30 hour per week Executive Assistant. The work includes the following:

- Overall town administration including finance, personnel, and economic development
- Intergovernmental relations
- Capital planning and asset management
- Support for department leadership and operations
- Selectboard meeting support, including agendas, meeting packets, minutes, follow up,
- Boards and committee administration
- Annual Town Meeting and Town Report
- Personnel functions and Collective Bargaining
- Employee relations, performance management, and discipline
- Leave administration and approval in many instances
- Procurement
- Licensing including liquor and common victualler and others
- Developing long and short-range plans
- Development and administration of budgets

## **COMPLIANCE ASSESSMENT AND RECOMMENDATIONS**

The Collins Center conducted an extensive review of Montague's procedures for all aspects of human resources, with particular attention to issues surrounding compliance with state and federal laws. Montague meets the minimum requirements and standards for compliance with employment laws and human resources practices. However, significant improvements should be implemented when possible. The following is a summary of findings and recommendations.

### **Position Descriptions & Classification**

Position descriptions, which were created in 2013, are generally current and accurate. When vacancies occur or duties shift significantly, the Town has addressed necessary changes.

### **Recruitment**



The Town has a disjointed recruitment process. The Selectboard is not the only appointing authority, which makes a uniform, legally compliant process difficult. In order to reduce liability, the Town should centralize all recruitment processes to the Town Administrator's office. Doing so does not take the authority away from department heads but provides for an equitable and consistent process. The same process should be followed for every recruitment process and detailed, consistent records should be maintained on each recruitment. Centralizing the function and the record keeping will help manage the process and reduce potential liability. This will require additional administrative resources in that office.

### **Employment Applications**

The Town's Application for Employment needs to be updated. The one currently being used contradicts current federal and state requirements. Specifically, the application must contain language relating to lie detectors, at-will employment, and credit history checks. Montague has accepted resumes and not required an application in all cases. It is important to obtain standard information on each applicant and require a signature of the applicant attesting that the information contained in the application is true and accurate even if a resume is submitted. In addition to updating the application, it is recommended it be made available through the Town's web site in a fillable pdf format and be required for candidates.

### **Screening Applicants, Interviews and References**

The Town has an inconsistent practice for screening applicants. Federal and state laws require the documentation of selection processes, and as such all records of resumes, applications and screening, regardless of appointing authority, be maintained. While Montague does keep records, they are not kept in a consistent manner and should be coordinated through, and maintained by, the Town Administrator's office.

Similarly, interviews are not handled in a consistent manner. It is a best practice to create a set of standardized questions and maintain documentation of questions asked and how they were answered. For department head and professional staff positions coordinated through the Town Administrator's office, and for appointments in the Police Department, this process exists and is

well done. For other departments, there are few, if any, true standards. Interviews tend to be informal and familiar. A contributing factor to the informality is that the applicants are often from the local area and known to the department head. As mentioned above, all hiring should be coordinated with and documented by the Town Administrator's office.

Reference, background, and Criminal Offender Records Inquiry (CORI) checks are not performed properly, or at all in some instances. It was revealed that the Police department is often asked to "run a check" on a candidate. At times, employees have been hired and then a CORI check is performed, which is not recommended. The Town should have one or two CORI officials designated by the Town Administrator and registered with the Commonwealth to conduct CORI processing in accordance with a clearly defined policy.

In most instances, reference checks are informal, and documentation is not maintained. A standardized reference form should be created and used by anyone conducting a reference check, and the records should be maintained in the recruitment folder in the Town Administrator's office.

#### **Pre-Employment Physicals**

Currently, the Town requires physical exams for Police, Public Works and Water Pollution Control departments. The practice of requiring a preemployment physical exam for positions requiring significant physical effort is recommended. Position descriptions should be forwarded to the physician conducting the exam and a statement regarding the candidate's fitness to perform the work should be required. Currently, department heads receive varying documentation from the exams, which often contain personal medical information. It is recommended that the process of scheduling and receiving information be moved to the Town Administrator's office and maintained separate from other files. Only confidential employees should be receiving medical information.

### **Civil Service**

The Police Department is governed by Civil Service regulations. The Town Administrator's office contacts the Commonwealth's Human Resource Division when a position is to be filled and receives the Civil Service List. The Police Chief coordinates the hiring process and conducts interviews and back ground checks. The candidates are required to have a physical and a psychological exam. At times, employees are allowed to begin work prior to the execution of a physical or psychological exam. The Town should discontinue this practice.

It should be noted the Police Department has a formal process of Civil Service recruitments, applications, interviews, and background checks that is well-organized and documented. Because of this, it is not recommended to shift the process for hiring Police Officers to the Town Administrator's office.

### **Conditional Offers of Employment & Appointment Letters**

The Town is inconsistent in the issuance of conditional offers of employment and appointment. Oftentimes, conditional offers are made verbally. A formal letter should be created when a position is offered and should include the pre-employment requirements. After all conditions are met, an appointment letter should be issued. The appointment letter should indicate the salary, the probationary period information, and instructions on where to report and what to expect on the start date.

### **New Hire Procedures**

The Town has no structured process for onboarding. Typically, new employees are sent to the Treasurer/Collector's office to meet with the Finance Assistant who walks them through a new hire packet which covers benefits and required forms. However, the process is inconsistent and often employees are given the packet to review on their own.

It is recommended the Town create a formal, comprehensive on-boarding procedure that truly orients an employee to the organization and explains the benefits, policies, and expectations of their position and the town itself. An onboarding checklist should be created. An orientation

should include required paperwork, benefit information, payroll and deduction requirements, optional benefits, probationary period information, conflict of interest requirements, and a set of comprehensive policies. A new employee should be given a week to review the town's policies and required to attest to reviewing them at the conclusion of the first week of employment.

### **Central File Retention**

The Town keeps personnel records in various locations. As in many municipalities, a concern is that many departments keep folders or files on each employee. It is recommended the Town Administrator have the responsibility to maintain the official personnel file for all employees. While the Treasurer/Collector department maintains benefit information and the Accounting department maintains payroll information, no other files should be kept. It is recommended that training or instruction be provided to department heads to ensure that any records kept by the department are also forwarded to the Town Administrator's office for placement in the official personnel file. There can be only one "official" file, however, it is permissible for departments to keep department-specific records such as certifications and license tracking.

Department heads and appointing authorities should be made aware of personnel record requirements, particularly as it pertains to medical information, discipline, and/or grievances. Additionally, the Police department, which manages Injured on Duty claims, should be instructed in the proper maintenance of such records. The Collins Center has provided guidelines on record retention to the Town Administrator under separate cover.

### **Training of Department Heads, Managers and Supervisors**

Providing training on policies is critical for all employees. Training is particularly important for supervisors in the areas of sexual harassment, discrimination, progressive discipline, and policy compliance. The Town should establish a schedule of training on policies, with attention to supervisory training. The Collins Center will provide initial training for supervisors and key personnel at the conclusion of this engagement.

### **Performance Evaluations**

Until FY2019, the Town was not consistently using its performance evaluation tool. The Collins Center recommends the Town Administrator continue the practice started in FY2019. Goals and objectives can be tied to budgeted programs and priorities. After department heads are evaluated, the Town should consider using a system for the evaluation of other employees. However, if a system is not going to be consistent, it may be best to discontinue. Training for supervisors in the practice of performance evaluation should be conducted prior to the reinstatement of any system.

### **Payroll and Leave Administration**

The Town Accountant is responsible for processing payroll and managing leave balances and accruals. At the beginning of each fiscal year, departments are given an excel spreadsheet file with weekly tabs for each payroll. For the departments that have a static workforce with no variations in hours, such as overtime, all weeks are printed, signed and returned to the Town Accountant immediately, and are then filed in weekly payroll folders. For the departments that have variable hours, such as Library, Parks and Recreations, Police, Public Works and Water Pollution Control, the payroll sheets are completed and submitted weekly.

Timesheets are provided to employees by the Town Accountant at the beginning of the fiscal year. As with payroll, each timesheet file has a tab for each week. Employees complete the forms, print them, get signatures of approval, and submit to the Town Accountant who verifies balances and tracks leave time.

The leave administration process is inefficient and requires duplication of effort. The employees complete the time sheet and it is delivered to the Town Accountant who then enters leave earned and used again into a spreadsheet. The spreadsheet is not transmitted electronically or on a shared folder. Additionally, the Collins Center understands that the current payroll software has limited capacity to enter payroll as time worked or time taken. Efforts should be taken to streamline the tracking of leave accrued and taken.

The Collins Center recommends, starting with the next fiscal year, the payroll sheets distributed to the departments build in the ability to submit payroll as hours worked and hours of leave with the capacity to code the type of leave.

### **Compensatory Time**

The Town has a Compensatory Leave Policy for Exempt Personnel which provides time off for hours worked above the regularly scheduled hours of work. For each hour of work beyond the regular schedule, exempt employees, those not entitled to overtime pay, are granted an hour of time off. The policy refers to this time as "compensatory time." Compensatory time by definition means time and one half in lieu of overtime pay. It is recommended the Town change the wording of this policy to call it "administrative", "bonus", "flex", or "additional" time owed. In the alternative, it is recommended the Town modify the policy to clearly state it is not compensatory time under the meaning of the Fair Labor Standards Act.

### **Workers Compensation and Injured on Duty**

Currently, the Finance Clerk serves as the Workers Compensation liaison to the insurance group MIIA. She receives the injury claims from the impacted departments and forwards them to MIIA for third party administration. The Town should move the functions of Workers Compensation and Injure on Duty administration to the Town Administrator's office. Critical issues of injury management, modified duty, claims management, and confidential medical information should be handled by the Town Administrator or Human Resources Coordinator.

## **HUMAN RESOURCES STRUCTURE RECOMMENDATIONS**

**Designate the Selectboard as Appointing Authority.** The Collins Center recommends the sole appointing authority for the Town be the Selectboard. The Town is the employer, promulgates policies and carries the liability insurance. The Selectboard should carry the liability and the responsibility for all human resources functions, as delegated to the Town Administrator necessary.

**Create Human Resources Coordinator Function.** The Collins Center recommends the Town adjust the responsibilities of the Executive Assistant position to include the functions of a Human Resources Coordinator, and add another position to the office, with the title of Department Assistant.

As mentioned above, the offices of the Selectboard and Town Administrator hold numerous responsibilities. The current staffing of two, the Town Administrator and the 30 hour per week Executive Assistant, manage to perform the responsibilities, but it is challenging. The office is often overwhelmed at peak times and no one is available to cover if there is absence for any reason. At times, the office has no coverage.

Modifying the Executive Assistant position to include the function of Human Resources Coordinator will facilitate the implementation of the recommendations relating to centralizing as many human resource functions as possible to the Town Administrator's office. The Executive Assistant/HR Coordinator position could be adjusted to shift the clerical duties performed for the Selectboard and the Town Administrator to the newly created Department Assistant position, freeing up time to focus on the critical human resource functions and higher level work of the office. Not having dedicated staff to human resources is a risk and a liability.

Creating a second position will also allow for cross training, office coverage, and back up, and provide for succession planning. Physical space issues will need to be addressed and the number of hours per week for each position will need to be determined through a budget deliberation process.

**Benefits and Payroll.** While benefit management and payroll are human resources functions, many municipalities place these functions in the financial offices, which has historically been done in Montague. The Collins Center recommends keeping these functions in place. As mentioned above, Workers Compensation and Injured on Duty leave administration should be transferred to the Town Administrator's office.

## **PERSONNEL POLICY BY-LAW REVIEW**

The Town's current personnel policies, which were updated in 2001, are contained in the Town of Montague Consolidated Personnel By-Laws (By-Laws). The By-Laws establishes the Selectboard as the Personnel Board, which is authorized to administer the provision of the By-Law and make recommendations to Town Meeting for amendments. As mentioned above, the Town Administrator position description created in 2013 designated the Town Administrator as the Personnel Director.

The Collins Center recommends the By-Law be amended to remove all personnel policies from the By-Law and refer to the Personnel Board as the authority to promulgate policies as recommended by the Town Administrator. Policies are an executive function, not a legislative function. Certainly, Town Meeting approves the Annual Budget, but should not have a role in approving administrative policies. Furthermore, with the ever-changing federal and state mandates regarding personnel policies, laws, and regulations, it is imperative the Town be able to amend policies as required.

## **PERSONNEL POLICY REVIEW**

It is critical the Town adopt a comprehensive set of human resource policies. With the increase in federal and state mandates regarding employment, not having a comprehensive set of policies is a liability. A comprehensive set of policies also helps the Town Administrator and staff to more effectively provide a single voice of authority on key human resource functions.

The Collins Center worked closely with the Town Administrator and selected staff members to review, revise, and create a preliminary comprehensive set of policies. The policies have been provided electronically. The list of policies recommended is attached to this report.

It is recommended the Town create an interactive system on the Town's website or in a shared file drive for easy searching and access to the policies. All employees and elected and



appointed officials should be required to read the policies and acknowledge they did so. The Town may choose to print physical copies of the set of policies to be available in a binder, but the Collins Center does not recommend the printing of policy books. Doing so requires extraordinary effort when policies are updated and can lead to confusion when determining the most recent update.

## **CLOSING**

An organization needs a human resources system to provide structure for employees, supervisors, and managers. Policies help define roles and responsibilities and a transparent understanding of expectations. Human resource management and policies are critical for legal compliance and provide avenues for ensuring both management and employee rights and obligations are being followed, as well as preventing legal issues and mitigating them if a problem arises. Having a designated human resource professional with clearly defined responsibility for the administration of, and compliance with, policies is critical in navigating employment issues. The Collins Center would like to thank the Town for allowing us to work with an amazing team of professionals.

## APPENDIX A - COMPREHENSIVE SET OF POLICIES RECOMMENDED

POLICY	ACTION
I. INTRODUCTION	
II. ANTI-FRAUD POLICY	
III. COMPENSATION, HOLIDAY AND LEAVE TIME	
IV. CONSOLIDATED OMNIBUS BUDGET	
IX. DRUG AND ALCOHOL-FREE WORKPLACE POLICY	
V. CONFLICT OF INTEREST POLICY	
VI. CRIMINAL & SEXUAL OFFENDER RECORDS INFORMATION	
VII. CONDUCT AND DISCIPLINE POLICY	
VIII. DOMESTIC VIOLENCE LEAVE POLICY	
X. EQUAL EMPLOYMENT OPPORTUNITY, ANTI-DISCRIMINATION	
XI. FAMILY MEDICAL LEAVE POLICY	
XII. GENERAL EMPLOYMENT POLICIES -	
XIII. GRIEVANCE PROCEDURE	
XIV. HEALTH INSURANCE PORTABILITY & ACCOUNTABILITY ACT	
XIX. PERSONNEL RECORDS	
XV. HOURS OF WORK AND OVERTIME POLICY	
XVI. INSURANCE BENEFITS	
XVII. MILITARY LEAVE POLICY	
XVIII. PARENTAL LEAVE POLICY	
XX. POLITICAL ACTIVITY	
XXI. RECRUITMENT AND SELECTION	
XXII. REFERENCES	
XXIII. RETIREMENT POLICY	
XXIV. RETIREE HEALTH INSURANCE	
XXIX. VEHICLE USE AND REIMBURSEMENT	
XXV. SOCIAL MEDIA POLICY	

POLICY	ACTION
XXVI. SICK LEAVE	
XXVII. SMALL NECESSITIES LEAVE ACT	
XXVIII. TECHNOLOGY USE POLICY -	
XXX. WHISTLEBLOWER PROTECTION	
XXXI. WORKPLACE SAFETY	
XXXII. WORKPLACE VIOLENCE PROTECTION	

October 28, 2020

Mr. Steve Ellis  
Town Administrator  
Town of Montague  
1 Avenue A  
Turner Falls, MA 01376

Re: 2 Year Guarantee Proposal

Dear Steve:

During these uncertain times, we hope you are well and safe. The Town of Montague is an important member of the MIIA programs. Due to the overall success of our programs and your favorable loss history, we are able to offer you a renewal proposal for FY22 and FY23 which includes a rate change of 0% for FY22 and up to 2.5% for FY23. We are pleased to offer this renewal proposal for your Property, Liability and Workers' Compensation.

Your overall contributions may reflect changes in exposures, such as an increase in building values, change in number of vehicles, change in expenditures, increases in payroll or changes in experience modification factors. This offer is being made to a limited number of MIIA members and is contingent on maintaining a favorable loss ratio for all lines of coverage below 60% through FY23.

MIIA is the non-profit insurance provider established in 1982 to deliver insurance cost stability for Massachusetts communities. We provide superior, competitive risk management solutions including health, dental, vision, property, liability and workers' compensation insurance to more than 400 cities, towns and other public entities in Massachusetts.

By accepting our proposal, you will continue to benefit from stable costs from MIIA's consistently superior coverages and services. In order to accept our offer, please sign and return the enclosed copy of this letter to our offices before November 11, 2020. For your convenience, enclosed is a return envelope. We appreciate your continued commitment to the MIIA programs.

Sincerely,

  
Joanne Stoll-Pizzano  
Account Executive

We wish to continue participating in the MIIA Property, Liability and Workers' Compensation programs for FY22 and FY23.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

7B



OFFICE OF THE GOVERNOR  
**COMMONWEALTH OF MASSACHUSETTS**  
STATE HOUSE • BOSTON, MA 02133  
(617) 725-4000

**CHARLES D. BAKER**  
GOVERNOR

**KARYN E. POLITO**  
LIEUTENANT GOVERNOR

October 30, 2020

Dear Mr. Steven Ellis,

Congratulations! I am pleased to notify you that the Town of Montague has been awarded a Recycling Dividends Program grant of \$8,400 through the Sustainable Materials Recovery Program. I want to thank you for your commitment to reducing waste and increasing recycling for the benefit of our communities and the environment.

Enclosed you will find further instructions from the Department of Environmental Protection on next steps. Please feel free to contact Wilfred Mbah if you have any questions.

Governor Charles D. Baker

Lt. Governor Karyn E. Polito

Handwritten signature of Governor Charles D. Baker in cursive script.

Handwritten signature of Lt. Governor Karyn E. Polito in cursive script.

# **Recycling Dividends Program and Small-Scale Initiatives: Approved Expenses**

## **Beyond the Bin**

Transportation and/or processing costs for recycling materials listed in RDP CHARM

Post-consumer Recycled Content Products from state contracts (\$2,000 per year).

- o FAC104 Landscaping, Green Roof Products, Playground, Site Amenities
- o FAC87 Recycling Containers, Compost Bins and Rain Barrels
- o FAC88 Lawns & Grounds, Equipment, Parts and Services
- o FAC100 Building Maintenance, Repair & Operations, Supplies and Tools
- o OFF45 Art and Instructional School Supplies
- o OFF47 Office Supplies, Recycled Paper and Envelopes
- o OFF38 Office, School and Library Furniture
- o OFF44 Print, Copy & Mail Services, and Printed Promotional Products
- o VEH96 OEM & NON-OEM Motorized Vehicle Parts, Refined Motor Oil, Lubricants

## **Closing The Loop**

<https://www.mass.gov/service-details/find-a-statewide-contract-user-guide>

## **Equipment**

Recycling carts/recycling bins

Roll-off containers, compactors, balers

Equipment for collection/recycling of hard to recycle materials, equipment repair

Dedicated Enforcement Coordinator

Recycling Coordinator salary

Project-based temporary staffing

## **Model Programming**

Pre-approved site improvements to recycling drop-off locations

Regional recycling hauling and/or processing bid development from state contracts PRF 61 & PRF 67; solid waste and recycling consultants through PRF67

PAYT program costs including bags, stickers.

Compost bins and screeners; kitchen scrap buckets

Organics carts for curbside collection

## **Organics Diversion**

Organics containers to support drop-off program

Organics collection

Organics program development costs for a new diversion program

## **Other**

Other expenses as approved in writing by MassDEP in advance of the expense. Includes recycling processing costs over \$50 per ton.

## **Outreach & Education**

Waste reduction and/or outreach and education materials, signs, mailings (and applicable postage costs)

Conferences and memberships (\$750 per year), newspaper ads, PSAs

Training costs, waste-audits, etc.

Educational speaker fees (solid waste and recycling topics)

Waste collection mobile applications and fees

## **Public Spaces**

Public space/outdoor event recycling containers

## **Reuse**

Establishing and/or maintaining a municipally operated swap-shop

\$5,000 annually on municipally owned Things/Tool Libraries (\$1,000 annually for third-party owned)

\$4,000 annually for municipally located Repair Events (excluding food/refreshments)

Reuse events

## **Schools**

School recycling and composting: stipend for coordinating school-wide or district-wide recycling/composting program; dishwasher

School composting: collection and processing costs

School recycling and composting: equipment to support source reduction, recycling, composting

## **Source Reduction**

Specific source reduction purchases: reusable tray and silverware for cafeterias, reusable shopping bags or reusable water bottles, installed water filling stations

## **Toxics Reduction**

HHW collection event set-up fees, second HHW event in calendar or fiscal year

School chemical cleanouts

Environmentally Preferred Products FAC85, Categories 1-7



Commonwealth of Massachusetts  
Executive Office of Energy & Environmental Affairs

## Department of Environmental Protection

One Winter Street Boston, MA 02108 • 617-292-5500

Charles D. Baker  
Governor

Karyn E. Polito  
Lieutenant Governor

Kathleen A. Theoharides  
Secretary

Martin Suuberg  
Commissioner

October 30, 2020

Mr. Steven Ellis  
Town Administrator  
Town of Montague  
1 Avenue A  
Turners Fall, MA 01376

Dear Mr. Ellis,

Congratulations! It is my pleasure to inform you that the Massachusetts Department of Environmental Protection (MassDEP) has awarded the Town of Montague Recycling Dividends Program funds under the Sustainable Materials Recovery Program. The Town of Montague has earned 14 points and will receive \$8,400.

The Sustainable Materials Recovery Program (SMRP) was created under 310 CMR 19.300-303 and the Green Communities Act, which directs a portion of the proceeds from the sale of Waste Energy Certificates to recycling programs approved by MassDEP. The Recycling Dividends Program (RDP) provides payments to municipalities that have implemented specific programs and policies proven to maximize reuse, recycling, and waste reduction. We are awarding over \$3.1 million in RDP payments to 227 municipalities in this round of funding.

Recycling programs play a vital role in limiting our dependence on landfills and incinerators, reducing greenhouse gas emissions and supporting economic activity in the Commonwealth. Recycling Dividend Program funds foster investment in local programs including recycling equipment, organics diversion, outreach and education, pilot programs, school recycling, toxics reduction and more. Please refer to the [RDP Approved Expenses List](#) for more information. MassDEP has invested in developing nationally recognized tools to assist municipalities with reducing recycling contamination and improving public awareness of smart recycling practices. We encourage you to utilize the [Recycling IQ Kit](#) and [Recycle Smart MA](#) website and to consult with your MassDEP [Municipal Assistance Coordinator](#) for assistance in implementing these best practices.

To accept your Recycling Dividends Program (RDP) award, please sign and return the RDP Contract as per the attached instructions. After we receive your signed contract, funds will be sent to your community. Should you have any questions, please email [Wilfred Mbah](#), our new program manager for RDP. Please note that awards for other SMRP grant categories will be announced separately.

These are extraordinary times. The increased challenge of maintaining our vital solid waste and recycling programs during a pandemic underscores the critical role of local government in keeping our communities safe and clean. Thank you for your continued commitment to recycling and waste reduction in Massachusetts.

Sincerely,

Martin Suuberg  
Commissioner

cc: Jan Ameen, Franklin County Solid Waste Management District

This information is available in alternate format. Contact Michelle Waters-Ekanem, Director of Diversity/Civil Rights at 617-292-5751.

TTY# MassRelay Service 1-800-439-2370

MassDEP Website: [www.mass.gov/dep](http://www.mass.gov/dep)

Printed on Recycled Paper

**RECYCLING DIVIDEND PROGRAM CONTRACT ("RDP Contract")  
BETWEEN THE COMMONWEALTH OF MASSACHUSETTS  
DEPARTMENT OF ENVIRONMENTAL PROTECTION ("MassDEP")  
AND THE Town of Montague ("Municipality")**

Pursuant to the Green Communities Act, relevant provisions of which are codified at M.G.L. c. 25A, Section 11F(d) and the regulations promulgated thereunder at 310 CMR 19.300 and in support of the Massachusetts Solid Waste Master Plan developed pursuant to M.G.L. c. 16, Section 21, MassDEP has awarded the Municipality a Sustainable Materials Recovery Program grant under the Recycling Dividends Program ("RDP"). The Municipality has earned a payment of \$8,400.

The Recycling Dividends Program provides payments to municipalities that have implemented specific programs and policies proven to maximize reuse, recycling and waste reduction. Municipalities receive payments according to the number of criteria points their program earns based on the *2020 Grant Guidelines* and number of residents served as described below. RDP provides an incentive for municipalities to improve their recycling programs by implementing best practices and rewards communities with model recycling and waste reduction programs.

**Duration:** The term of this Contract shall be in effect until the municipality has expended all RDP funds and reported to MassDEP on use of funds.

**RESPONSIBILITIES OF THE MUNICIPALITY**

1. **Authority:** The Signatory of this RDP Contract is authorized by the governing body of the Municipality to enter into this Contract on behalf of the Municipality and apply for and accept funds on behalf of the Municipality.
2. **Commonwealth Terms and Conditions:** The Municipality shall comply with the Commonwealth Terms and Conditions and other requirements set forth in the Municipality's executed Master Service Agreement.
3. **Failure to Comply:** If, in the judgment of MassDEP, the Municipality fails to comply with any of its responsibilities identified in this Contract, then, at the election of MassDEP, (a) the Municipality shall repay the RDP funds to MassDEP within 90 days; and/or (b) title to all materials purchased with the RDP funds immediately and without any further steps shall be transferred to MassDEP; and/or (c) MassDEP may find the Municipality not eligible to seek another Sustainable Materials Recovery Program Grant for up to three years. MassDEP may provide written notice to the Municipality of any such failure to comply. Such notice may provide a time period and manner for the Municipality to cease or remedy the failure. Such notice from MassDEP of any such failure by the Municipality is not a precondition to MassDEP's right to select options (a), (b), and/or (c) above. The Municipality shall follow the instructions of MassDEP regarding possession of the materials purchased with RDP funds. The Parties hereby agree to execute any and all documents necessary to accomplish said transfer. Furthermore, the Municipality shall transfer or arrange to transfer actual possession of said materials to an authorized representative of the Commonwealth of Massachusetts or its designee.
4. **Recycling in Practice:** The Municipality has established paper, bottle and can recycling in all municipal buildings, offices and meeting spaces, excluding schools. The Municipality shall continue such paper, bottle and can recycling during the term of the RDP Contract.
5. **Buying Recycled Products:** The Municipality has established a written policy which promotes a preference for the purchase of recycled products in lieu of non-recycled products and all staff with purchasing authority are aware of and are following the established policy during the term of the RDP Contract. **Proof of annual buy recycled policy staff notification is required for all SMRP grant applications.**



6. **RDP Payment Calculation:** MassDEP has calculated the RDP Payment using the table below which shows payment brackets based on the number of households served by the municipal solid waste program and the point value for each bracket. *Section 7 – Program Criteria* and the 2020 *Grant Guidelines* describe in detail the conditions for earning points.

**RDP Payment Brackets**

Trash HH Served	Value of Each Point	Minimum Payment	Maximum Payment
0 - 1,999	\$350	\$2,800	\$9,100
2,000 - 4,999	\$600	\$4,800	\$15,600
5,000 - 7,499	\$1,100	\$8,800	\$28,600
7,500 - 9,499	\$1,300	\$10,400	\$33,800
9,500 - 12,499	\$1,800	\$14,400	\$46,800
12,500 - 16,999	\$3,000	\$24,000	\$78,000
17,000 - 24,999	\$3,500	\$28,000	\$91,000
25,000 - 31,999	\$4,000	\$32,000	\$104,000
32,000 - 99,999	\$6,500	\$52,000	\$169,000
100,000 +	\$10,000	\$80,000	\$260,000

7. **Program Criteria:** The Municipality, through its RDP application, certifies that all points earned are for programs that were in place no later than June 10, 2020 and that these programs fully meet the performance standard set forth in the 2020 *Grant Guidelines*. *Section 13 – RDP Payment Calculation* lists the program criteria for which the Municipality has earned points, and upon which the Municipality's payment was calculated.
8. **Use of Funds:** RDP Payments shall be expended on Approved Expenses listed in the *Grant Guidelines* to enhance the performance of the Municipality's waste reduction programs. Use of a dedicated account or revolving account is recommended but not required. Funds may be carried over to future years and accumulated to fund a larger eligible expense or project. Planned use of funds shall be noted on the Annual RDP Spending Report. However, MassDEP may delay future RDP payments if municipality is not expending funds.
9. **Record Keeping:** The Municipality shall be responsible for keeping documentation (i.e. proof of purchase in the form of an invoice which lists the vendor name and address, item purchased, item price, number of items purchased and shipping costs if any) by calendar year, of how RDP funds were expended and the remaining balance of RDP funds. MassDEP may conduct record audits to ensure compliance with this Contract.
10. **Reporting:** By February 15<sup>th</sup> of each year, for the duration of the Contract, the Municipality shall submit the annual Recycling and Solid Waste survey and the RDP Spending Report through its ReTRAC Connect™ account. Failure to comply with these reporting requirements will jeopardize future grant awards and RDP payments.
11. **Environmental Compliance:** The Municipality understands receipt of RDP funds from MassDEP does not in any way imply that the Municipality is in compliance with applicable environmental regulations. This Municipality shall not be construed as, nor operate as, relieving the Municipality or any other person of the necessity of complying with all applicable federal, state, and local laws, regulations and approvals. The Municipality's facility(ies) are subject to inspection at any time by MassDEP and noncompliance with applicable environmental regulations may result in formal enforcement actions, including penalties.

12. Addendums: Should MassDEP award additional RDP funds, an addendum to the Contract shall be provided to the Municipality. The same terms and conditions apply to the addendum.

13. RDP Payment Calculation:

The Municipality's payment has been calculated as follows:

(Value of each point) x (Total RDP Points)

a. Solid Waste Program	4
b. Organics	0
c. Bulky Items	2
d. ReUse Points	0
e. Yard Waste	2
f. Household Hazardous Waste	2
g. Center for Hard to Recycle Materials	2
h. Comprehensive Hauler Regulation Adopted	0
i. Enforced Residential Curbside Recycling	0
j. Outreach and Education	1
k. Recycling Center Access	0
l. Textile	1

TOTAL RDP POINTS 14

VALUE OF EACH POINT \$ 600

RDP PAYMENT AMOUNT \$8,400

IN WITNESS WHEREOF, MassDEP and the Municipality hereby execute this Contract.

**COMMONWEALTH OF MASSACHUSETTS**

By: \_\_\_\_\_  
Greg Cooper, Division Director  
Bureau of Air and Waste  
Department of Environmental Protection  
(Date)

Town of Montague  
VC6000191893

By: \_\_\_\_\_  
(Signature and Title) (Date)  
\_\_\_\_\_  
(Print Name)



7C  
November 2, 2020

Mr. Steven Ellis  
Montage Town Administrator  
1 Avenue A  
Turners Falls, MA 01376

**Re: Price Proposal for Property Condition Assessment  
Town of Montague Public Libraries**

Dear Mr. Ellis

I am pleased to provide you with this price proposal for Property Condition Assessment service for the Town of Montague Public Libraries. We confirm that this price proposal shall remain valid for sixty (60) days from the date of this letter..

PCA360, LLC shall provide the Scope of Services in accordance with our proposal for a Building Condition Assessment for the Fixed Fee of **Three Thousand Dollars (\$3,000.00) per** library building. It is our understanding that the Town would like to evaluate all three (3) libraries, the Carnegie Public, Millers Falls and Montague Center.

Our proposal includes all of the required services as set forth in our proposal and the work will be performed by a licensed professional. If, in the course of our evaluation it is determined that the services of a mechanical or electrical engineer are required to perform further detailed analysis of a particular condition (determining the available capacity of the emergency generator at the High School for the purpose of possibly adding more equipment to the generator as an example) we can provide that expertise as an additional service. Any such additional services would be at the sole direction and approval of the District.

Our fee shall be invoiced monthly as per the attached Terms and Conditions, with payment due within thirty (30) days from the date of invoice.

We hope that the our proposal meets with your approval. We look forward to working with you on this project and request that you indicate your acceptance of this letter of agreement by signing in the space provided below.

Best regards,

A handwritten signature in black ink, appearing to read 'Greg Walsh', written over the printed name.

Gregory J. Walsh  
Managing Partner  
PCA360, LLC

**AGREED & ACCEPTED**

\_\_\_\_\_  
Steven Ellis  
Town of Montague Administrator

## **Terms and Conditions**

PCA360, LLC shall perform as agent for The Town of Montague, the professional services designated and described in the Proposal Agreement between the parties dated November 2, 2020, which constitutes a part of these Terms and Conditions.

### **1. Retainer**

All work outlined in the attached Proposal Agreement will commence upon receipt of a fully executed Agreement and, if requested, a retainer. All retainer amounts will be applied to the final invoice. A retainer of **\$-0-** is required before work can commence under this Agreement.

### **2. Payment**

Payment under the Agreement is the sole responsibility of the signatory of this Agreement and is not subject to third party agreements.

### **3. Payment Terms**

Payment under the Agreement is the sole responsibility of the signatory of this Agreement and is not subject to third party agreements.

### **4. Invoicing**

Invoices will be rendered monthly and are payable within thirty (30) days of the date of invoice. If payment is not made within thirty (30) days, the amounts shall be subject to a finance charge of one and one-half percent (1.5%) per month from the thirtieth day. In addition, PCA360, LLC may, after giving seven (7) days written notice, suspend services under this Agreement until it has been paid in full all amounts due for services invoiced without any liability for delays or damages which may result therefrom.

### **5. Additional Services**

Requests for additional services must be authorized in writing before additional work can begin. Any fee adjustment required will be established at that time and agreed to in writing prior to the commencement of the work.

### **6. Services of Consultants**

In the event that PCA360, LLC is required to retain the services of third party consultants (architects, engineers, lawyers, etc.) in connection with the completion of its services under this Agreement PCA360, LLC shall notify the Town of Montague and, upon approval by the Town of Montague any fees arising from the engagement of such third party consultants shall become the obligation of the Town of Montague and will be at the 1.1 times the direct cost of said consultants.

### **7. Risk Allocation**

The Town of Montague hereby agrees to limit PCA360, LLC total liability for any claims of damages of any nature whatsoever to a maximum amount equal to PCA360, LLC's portion of the total compensation received by PCA360, LLC under this Agreement.

### **8. Testimony**

In the event that PCA360, LLC or its employees are required to provide testimony or testify in a court of law or arbitration in connection with any aspect of the services rendered under this Agreement, PCA360, LLC shall be reimbursed at the hourly rates stated in this Agreement. For the purpose of this Agreement, the stated hourly rate for Principals is \$235.00 per hour and the stated hourly rate for Associates is \$175.00 per hour.

### **9. Termination**

Either party upon thirty (30) days written notice may terminate the obligations of either party. All fees associated with this proposal and the work shall be pro-rated based upon the percentage of actual work completed and shall become immediately due and payable.

Town of Montague  
Library Buildings Condition Assessment

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## 1. FIRM PROFILE & QUALIFICATIONS

### ***Firm Profile***

Established over 28 years ago originally as Potomac Capital Advisors, **PCA360** is a full service consulting firm providing program management, advisory/feasibility services, development services, due diligence services, property condition assessments and project management to commercial, institutional and government clients. Our staff are trained and practiced in both large and small scale projects and our experience spans multiple product types including educational, commercial office, institutional, multi-family housing, life sciences, retail, assisted living, and early child development.

Composed of highly seasoned professionals who have worked for major national and international real estate development and commercial construction companies, we bring extraordinary talent and capabilities to every assignment. Each of our staff average of 20 years of industry experience apiece, our team is well qualified.

### ***Key Differentiators***

Many Architecture firms will submit proposals for this assignment, most will have at least the same general qualifications, what distinguishes PCA360 and sets us apart from the others are the following unique characteristics:

#### Breadth & Diversity of Experience

**PCA360 has successfully evaluated the property condition of over \$36 billion** in real estate for clients. Not only do we perform evaluations for commercial, institutional and public clients we also perform development consulting, advisory and project management services for new construction and renovation projects. Our real estate development and feasibility experience provide a broader understanding of how and why projects succeed, which allows us to better assess buildings. This breadth of experience complements and strengthens our skills to conduct property condition assessments.



#### Think & Act like Owners

Much of our work is for private and institutional investors, clients who have exceedingly high expectations and very demanding requirements for time, cost and quality. We don't just manage "other" peoples' projects, we understand in a very concrete sense our role as the Owner representative and the significance that we are the "Owner" on every project that we work on. We completely immerse ourselves in our projects as if the properties we are involved with are our own. When you think like an Owner you can make recommendations which are more closely aligned with the Owner's interests and objectives, and the subtleties of the functional and operational aspects of their business.

#### Extraordinary Results – Extraordinary Thinking

Every assignment at PCA360 gets the participation and attention of our Principals, a commitment which ensures that each client benefits from the best available critical minds. This always results in a project which outperforms our clients' expectations and provides tangible value. PCA360 doesn't just deliver projects. We deliver projects that meet our Owners most demanding needs, achieve best in class design and performance and create enduring value.

## **Qualifications**

In addition to the significant professional experience of PCA360 Team, we have important, relevant knowledge and expertise which makes us particularly well suited for this assignment.

### **Knowledge of Codes**

PCA360 project team has in excess of 150 years of collective experience developing and building projects for clients. We have a demonstrated track record of successfully managing projects through every aspect of permitting, design and construction.

We have extensive experience working with, understanding and interpreting the Massachusetts State Building Code (9<sup>th</sup> Edition), the Americans with Disabilities Act (ADA) and the regulations of the Massachusetts Architectural Access Board (MAAB). With two licensed builders and an architect on staff who regularly practice, they are required by their professional certifications to have a full knowledge of the codes.

### **Energy Conservation Experience**

PCA360 is committed to sustainable development and construction. Its principals and senior staff are all LEED Accredited Professionals. For several projects, we implemented a number of sustainable initiatives including rainwater harvesting for irrigation and grey water uses, photovoltaic cells for electrical generation, cogeneration and low flow plumbing fixtures. We can assist the Town in identifying opportunities to for reducing energy consumption, lowering operating expenses, improving overall building performance and equipment longevity. Our extensive prior success with LEED projects gives us the capability to provide council to the Town of Montague and assist in making recommendations regarding the cost/benefits of various green initiatives and energy conservation methods.



### **Life Cycle Analysis**

Our team has years of design & construction experience and has developed a strong understanding of the life cycle and costs of most materials and systems used in the complete construction process. In addition to knowledge gained from our estimating experience, previous lessons learned have helped us to establish a database of useful information that complements this review and analysis process.

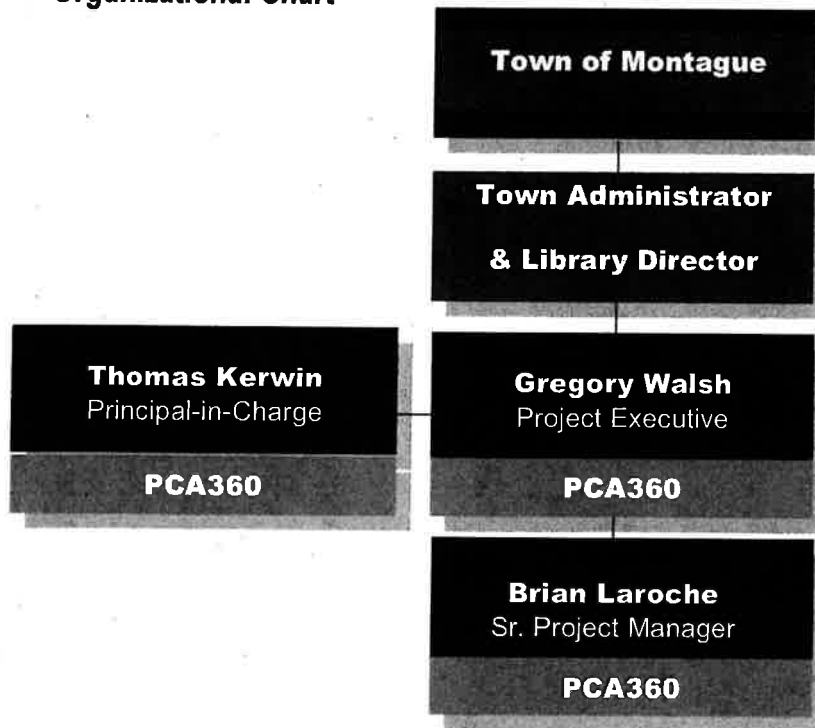
We will actively engage in the review of life cycle analyses and provide advice to the School District regarding the proposed options. We will work closely with the District to evaluate the life cycle analysis for capital improvements and will provide guidance regarding options and their cost benefit.

### **Estimating**

Drawing upon a database of historical information as well as our resources among seasoned high quality subcontractors who provide real time market information, PCA360 can provide cost guidance to the team that will allow them to make informed decisions.

## 2. PROJECT TEAM

### *Organizational Chart*



### ***Key Personnel***

#### PCA360, Inc.

Thomas Kerwin, LEED AP, Principal

Gregory J. Walsh, LEED AP, Project Executive

Brian P. Laroche, LEED AP, Architect, Senior Project Manager

See detailed resumes for each of the above listed individuals on the following pages:

### ***Technical Support (only if required and requested as additional service)***

#### AM Fogarty

Peter Timothy, Estimator

#### SMMA

Chris Davis, Director of Commissioning (Mechanical Engineer)

#### E3i Consulting Engineers

Bill Leuci, Principal



## Thomas Kerwin

Managing Partner & Project Director

Tom has over 35 years of experience managing construction projects for public and private Owners. In his capacity as an Owner's representative, he oversees the entire spectrum of a construction project from the early planning and feasibility stages through design, construction and final occupancy. Tom is an effective leader in collaborating and building the team harmony necessary to achieve shared project goals. As a Project Director/Executive, Tom manages the entire process "from concept to completion". His years of experience and attention to detail result in projects that are often under budget and ahead of schedule.

### Partial List of Relevant Project Experience

Emerging Technologies and Innovation Center, Lowell, MA

Edward M. Kennedy Institute for the United States Senate, Boston, MA

South-West Middle School, Quincy Public Schools, Quincy, MA

Greater Lowell Technical High School, Greater Lowell Regional Public Schools, Tyngsboro, MA.

Venture Development Center, University of Massachusetts, Boston, MA

Wheatley Hall + Science Center, University of Massachusetts, Boston, MA

Massachusetts Medical Device Development Center, Lowell, MA.

Lincoln Campus Center Hotel, Amherst, MA

Inn and Conference Center, Lowell, MA

North Campus Parking Garage, University of Massachusetts, Lowell MA

Fox Hall Dining Commons, University of Massachusetts, Lowell, MA

Cedar Dell Residential Complex, University of Massachusetts, Dartmouth, MA

Warren Towers\*, Boston University, Boston, MA

Sleeper, Claflin, Rich Halls, Boston University, Boston, MA

Boston University Academy, Boston, MA

### Education:

B.S. Boston University

### Registrations / Certifications:

Massachusetts Certified Public  
Purchasing Official

### Memberships & Affiliations:

Construction Management  
Association of America

Boston Chamber of Commerce  
Development Committee

### Experience:

35 Years of Experience

## Gregory J. Walsh

Managing Partner, Project Executive

As principal and co-founder of PCA360, Mr. Walsh shares responsibility for the management and operations of the firm, as well as devoting a significant amount of time to working closely with clients. Mr. Walsh is actively engaged in projects managed by the firm.

Mr. Walsh has in excess of 36 years project management experience assisting clients with the design, bidding and construction of their projects ranging from \$2M to \$200M. An effective leader and collaborator, he has the skills to manage the efforts of the project team and engage the owner, designer and contractor in a constructive process which delivers the desired result.

Previously, Mr. Walsh was the Director of Real Estate at Massachusetts General Hospital, the largest research and teaching hospital in the United States and also worked at Cabot, Cabot & Forbes, a national real estate development company specializing in commercial projects.

### Partial List of Relevant Project Experience

**Furnace Brook Middle School, Marshfield, MA**  
Roof and HVAC Replacement. - Project Cost: \$8,500,000  
Project Director for the design, bidding and construction of a 130,000 sq. ft. roof and replacement of major roof top air handling units and systems controls at this middle school under the MSBA Accelerated Repair Program. Oversaw construction manager and subcontractor pre-qualification process, bidding and award of construction contract in accordance with Chapter 149.

**Heights Elementary School, Sharon, MA**  
Roof Replacement - Project Cost: \$2,000,000  
As Project Manager had direct responsibility for the design, bidding and construction of a new roof at the elementary school under the MSBA Accelerated Repair Program. Prepared RFQ's for contractor pre-qualification process and oversaw the bidding and award of all construction contracts in accordance with Chapter 149.

**Mystic Water Works, Somerville, MA**  
25 Unit Affordable Elderly Housing - Project Cost: \$12,500,000  
Assisted the Somerville Housing Authority with development and project management services for the construction of 25 units of low income elderly housing in a former MWRA pumping station.

**Edward M. Kennedy Institute, Boston, MA**  
Project Size 50,000 sq. ft. Project Cost: \$50,000,000

**The Cathedral Church of St. Paul, Boston, MA**  
Project Size 25,000 sq. ft. Project Cost: \$10,100,000

**55 Hudson Yards, New York, NY**  
Project Size 1,300,000 sq. ft. Project Cost: \$1,500,000,000

### Education:

Bachelor of Arts from Boston College

Harvard University Certificate in Construction Management

### Certifications | Licenses:

LEED Accredited Professional, 2008

MCPPO - 2011

### Experience:

36 Years of Experience

### Massachusetts General Hospital

Director of Real Estate

### Cabot, Cabot & Forbes

Senior Project Manager

### Tremont Development & Consulting

Principal

### Consumers Savings Bank

Project Manager

### Relevant Property Condition Assessments:

Colrain Central School, Colrain, MA  
Buckland Shelburne Elementary School  
Sanderson Academy, Ashfield, MA  
Mohawk Regional HS, Buckland, MA  
Heath Elementary School Heath, MA  
2036 Washington Street, Hanover, MA  
One Financial Center, Boston, MA  
John Hancock Complex, Boston, MA  
501 Boylston Street, Boston, MA  
116 Huntington Street, Boston, MA  
200 Newport Avenue, Quincy, MA  
Technology Square, Cambridge, MA  
One Beacon, Boston, MA  
Bay Colony, Waltham, MA  
1615 L Street, Washington D.C.  
Carr America Portfolio, Washington D.C.  
2445 M Street, Washington D.C.  
1330 Avenue of Americas, New York, NY  
1350 I street, NY, NY  
31 W 32nd, NY, NY  
99 Church Street, NY, NY



**Brian P. Laroche, AIA, LEED AP**  
Sr. Project Manager

As a Senior Project Manager for PCA360, Mr. Laroche is responsible for providing clients with planning, programming, design, and construction review and project management services for a broad variety of projects from inception through completion to occupancy.

For more than 22 years, Mr. Laroche has participated in the design and construction of K-12 academic, commercial, retail, senior housing, and projects ranging from \$200,000 to over \$60,000,000.

**Partial List of Relevant Project Experience**

**Furnace Brook Middle School, Marshfield, MA**

Roof and HVAC Replacement - Project Cost: \$8,500,000

Project Manager with direct responsibility for the design, bidding and construction of a new roof at the middle school under the MSBA Accelerated Repair Program. Prepared RFQ's for contractor pre-qualification process and oversaw the bidding and award of all construction contracts in accordance with Chapter 149. The project was delivered on budget and on schedule.

**Spring Street Elementary School, West Bridgewater MA**

Roof Replacement - Project Cost: \$1,300,000

Project Manager for all aspects of the roof replacement project under the MSBA Accelerated Repair Program. Conducted design review and oversaw the Managed the design, bidding and construction of new roofs and windows at two elementary schools and at a Middle and High School under the MSBA Green Repair Program. Oversaw the bidding and award of all construction contracts in accordance with Chapter 149. Successfully managed a bid protest for the benefit of the school district. The project was delivered on budget and on schedule.

**Narragansett Regional School District, MA**

Roof and Boiler Replacement. - Project Cost: \$1,300,000

As Project Manager had direct responsibility for the design, bidding and construction of a new roof at the Middle School and a new boiler at an elementary school under the MSBA Green Repair Program. Prepared RFP's and oversaw the bidding and award of all construction contracts in accordance with Chapter 149. The project was delivered on budget and on schedule.

**Leverett Elementary School, Leverett, MA**

Roof and Window replacement project. - Project Cost: \$900,000

Oversaw the feasibility study which lead to a design package that was bid and awarded in accordance with Ch 149. PCA oversaw all construction contracts and provide on-site representation. The project was delivered on budget and on schedule.

**South-West Middle School, Quincy, MA**

MSBA Core Program New Construction - Project Cost: \$59,000,000

Project Manager with direct responsibility for all aspects of design and construction of this new school. Procured Construction Manager as Risk under Ch149A. The project is currently under construction.

**Mohawk Regional School District, 8 Member Towns (Western, MA**

Property Condition Assessment / Capital Plan

Lead field reviewer for the assessment of five District school buildings. The purpose of the evaluation of the buildings was to determine the immediate repair / maintenance needs, identify long term capital projects and develop a Capital Plan for the District.

**Education:**

Associates Degree, Architectural  
Engineering Technology

Bachelor of Architecture, Wentworth  
Institute of Technology

**Certifications & Licenses:**

Massachusetts: Architect, #20156

LEED Accredited Professional, 2008

Massachusetts Certified Public  
Purchasing Official Program, Certification  
for Owner's Project Managers, March,  
2009.

Commonwealth of Massachusetts  
Construction Supervisors License,  
Unrestricted.

**Experience:**

22 Years of Experience

DW Arthur Associates Architecture

Harvard University – JFK School

MFPA Architecture

Margolis and Fishman Architecture

**Relevant Property Condition  
Assessment Experience**

Colrain Central School, Colrain, MA  
Buckland Shellburne Elementary School  
Sanderson Academy, Ashfield, MA  
Mohawk Regional HS, Buckland, MA  
Heath Elementary School Heath, MA  
Clarksburg Elementary School, MA  
St. Francis De Sales School, NYC  
Mount Alvernia Academy, Brookline, MA  
Carr America Portfolio, Washington, DC  
John Hancock Complex, Boston  
One Financial Center, Boston  
2036 Washington Street, Hanover  
49 Landsdowne Street, Boston  
180 Hartwell Road, Bedford  
1249 – 1254 Boylston Street, Boston  
40 Court Street, Boston  
200 Newport Ave, Quincy  
32 Old Slip, NY, NY  
450 Park Avenue, NY, NY  
St. Francis De Sales School, NY, NY  
31 W 32nd, NY, NY

## **References – Brian Laroche, Field reviewer**

---

### **Andrew Moore**

Managing Director  
Beacon Capital Partners  
200 State Street, Boston, MA 02109  
(617)457-0400

### **Projects:**

-Property Condition Assessments for:  
One Financial Center, Boston, MA  
32 Old Slip, New York, NY  
One Beacon, Boston, MA  
200 State Street, Boston, MA  
501 Boylston Street, Boston, MA  
Hancock Tower Complex, Boston, MA  
Carr America Portfolio, Washington DC  
Trisec / Blackstone Portfolio, Chicago, IL

### **Robin Pease**

Facilities Director  
Mohawk Regional School District  
24 Ashfield Rd, Shelburne Falls, MA 01370  
(413) 625-0192

### **Projects:**

-Property Condition Assessments for:  
Mohawk Regional Middle & High School  
Buckland Shelburne Elementary School  
Colrain Elementary School  
Heath Elementary School  
-Buckland Shelburne ES – Roof Replacement  
-Colrain ES – Roof and Window Replacement  
-Mohawk Regional MS&HS - Roof and Window Replacement

### **Paul Crowley**

Deputy Director of Real Estate  
DCAMM – Mass. Dept. of Capital Asset Management  
& Maintenance  
160 Salton Stall, Boston, MA 02108  
(857)204-1520

### **Projects:**

-Wellesley Office Park - Property Condition Assessment  
-Hancock Garage - Rehabilitation Project  
-John Hancock Tower, Boston – Multiple Capital Improvement Projects

### **Vincent Cucchiara**

The Grantham Group  
99 Pleasant Street  
Marlborough, MA 01735  
(617)347-0324

### **Projects:**

-Christopher House Nursing Home  
-Christopher Heights Assisted Living Communities in:  
Attleboro, Belchertown, Concord, Marlborough  
Northampton, Webster, Worcester  
Property Condition Assessments & Capital Plans for:  
-Christopher House Nursing Home  
-Christopher Heights Assisted Living Communities  
Attleboro, Marlborough, Webster, Worcester

### **3. MANAGEMENT APPROACH**

#### ***Management Approach***

PCA360 is committed to providing a superior level of Property Condition Assessment services for the Town of Montague. The following Management Approach and Management Plan will provide an overview of how we anticipate fulfilling the evaluation and Property Condition Assessment of the Town of Montague's Library buildings.

##### Project Controls

The foundation for success on any project is strong project controls. With a well-established system of communication, schedule and attentive supervision will afford the Town of Montague the ability to routinely monitor the status of the project with ease.

##### Collaborative Process

Our most important roles is to facilitate communication, foster cooperation and develop a sense of collaboration between our team and the Town of Montague that that allows us to perform at the highest possible level. We will actively work with all the team members and the Town to make certain that the communication of information is smooth, effective and that there is continuity across all of the disciplines.

##### Critical Thinking & Leadership

Our core mission is "Extraordinary Results, Extraordinary Thinking". We believe that critical thinking is the essence of superior project management. We are unafraid to ask hard questions which challenge conventional wisdom. We invite the team to reconsider "commercially reasonable" approaches which we believe in some cases may not yield the best results for our clients. We regularly encourage our architects and engineers to think "outside of the box" and ask them to put aside their "typical approach" and consider more innovative means to outperform for the client.

##### Clarity of Purpose and Direction

Without a clear purpose and direction, it is impossible to succeed, and no one's expectations will be met. The key to a superior outcome is facilitating a process that asks the right questions and gathers all the important information necessary to make the informed decisions that are required to establish the objectives of the project.

PCA360 will act as the catalyst that will bring together the stakeholders and guide them through the process of information gathering, evaluation and assessment, and the development of a 10 Year Capital Plan for the Town of Montague's buildings.

#### ***Project Understanding***

The Town of Montague is currently evaluating the its three (3) public libraries to develop a 15 year capital / action plan to assess and prioritize their resources. The buildings include the Carnegie Public Library, the Millers Falls Library and the Montague Center Library.

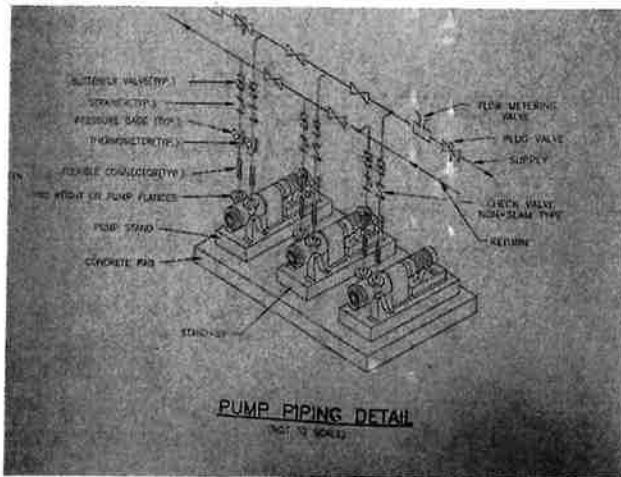
#### ***Scope of Services***

PCA360 will provide the following scope of services to identify and document the general condition and quality of the Property and to make known any deficiencies of the Property.

#### **Documents and Records Review**

- a) *Design Professional and Construction Documents*

To the extent that any such documents are produced for review PCA360, Inc. shall review of available and relevant documents, including, but not limited to available Construction Documents and Specifications – such as site plan, civil, architectural, geotechnical, structural, fire protection, plumbing,



mechanical (HVAC), and electrical documents. We will also review any reports, as-built drawings, test records and any other relevant documentation developed during the design and construction process. All such reviews shall be subject to the availability of the documentation and PCA360 ability to be provided with copies of important documents to take with it at the conclusion of the initial tour.

To the extent that original documentation is available, and that it is representative of the current and "as built" condition of the Property,

PCA360 shall perform a cursory review, to assess, and report on the quality of original design and engineering practices; appropriateness of selected systems, components, materials and equipment; quality of materials, construction methods, and workmanship; unique maintenance or durability factors and significant defects; and general level of finish in relation to the market for similarly functioning and located properties.

**b) Building Operations Records and Documents**

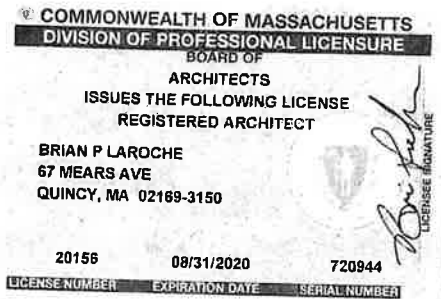
PCA360 shall review any furnished building records, including, but not limited to: maintenance, testing and repair logs; maintenance and service contracts; warranties and bonds; and material inventories.

PCA360 shall review, assess and report on operation and maintenance programs, preventive maintenance, past and current problems, owner and tenant responsibilities, as well as past, current, and planned repairs, replacements or remodeling, including scope of work, objectives, and budgets, all to the extent that this information is provided by the Seller.

**Site visual survey**

During the survey PCA360 shall visually observe and evaluate the Property's construction, materials, systems and components, identifying physical characteristics and deficiencies. Survey procedures will include a walk-around-visual survey by a Field Observer who is a licensed Architect and Builder in the State of Massachusetts. PCA360 will note building code violations pertaining to systems or inherent design flaws that are readily apparent.





PCA360 shall report on general site and building condition; unique features and significant deficiencies compared to similar buildings; level of upkeep and maintenance; required or suggested corrective actions; violations and non-conforming conditions; remaining life of components; and estimates of costs to correct, repair and/or replace building components and/or systems.

## Major Components/Systems

PCA360's inspection and review shall include, but not be limited to, the following major components or systems:

### (1) Site Conditions, Utilities, and Parking Facilities

Assess the overall condition of the site, pavements, and exterior parking. Observe pavement condition and drainage, overall site design, retaining walls, sidewalks, lighting, and other similar site features. Assess conditions of existing utilities, overhead and exposed (underground evaluation of buried utilities is outside of this study).



### (2) Substructure and Superstructure

Observe and identify deficiencies or defects which indicate structural or foundation problems.

### (3) Building Envelope

Perform a ground level survey of the building shell to assess exterior curtainwall, cladding and glazing systems. Identify visible distress to building materials and evidence of water leaks in the exterior skin.

Perform visual observations of the exposed roof surfaces to assess the general condition and remaining useful life of the roofing system.



### (4) Interior Elements

Assess the quality and condition of the horizontal and vertical surfaces in interior areas of the building, including common area lobbies and corridors, rest rooms, leased spaces and mechanical/utilitarian areas. Assess compatibility with the remainder of the Property.

### (5) Mechanical, Electrical and Plumbing (MEP)

Assess the age and operating condition of MEP equipment. Observations shall be used to anticipate replacements and/or major repairs that may be necessary. Review current and previous



maintenance and repair practices and perform interviews with maintenance personnel. Assess the overall capacity of incoming electrical services.

(6) *Fire Protection and Life Safety Systems*

Identify, observe and assess life safety and fire protection systems, including fire suppression, sprinklers and standpipes (wet and dry), water supply condition and acceptability, stairwell pressurization, fire detection/alarm and communication systems, building egress and emergency power and lighting. Where applicable, make recommendations for further on-site testing of the systems (testing is not part of this study).

(7) *Vertical Transportation (if any)*

Assess the condition of the vertical transportation equipment (elevators, escalators, lifts, LULA's, dumbwaiters, etc.).

(8) *Property Special Systems*

Assess availability, existence, and condition of building specialty systems. (Roof anchors, CCTV, Security, etc.)

(9) *Property Telecommunications*

Assess availability, existence and condition of the buildings wired and wireless telecommunications systems.

(10) *Americans with Disability Act (ADA) – Abbreviated Accessibility Survey*

Evaluate the facility for general compliance with the guidelines of Title III (Public Accommodations) of the ADA. Review the pertinent components of the facility, with regard to compliance with the specific provisions of the ADA, as described in ASTM Standard E2018-15, Abbreviated Accessibility Survey checklist. PCA360 will identify the components of the facility viewed to be non-compliant, identify practical solutions, and provide opinions of cost. The ADA survey will include the parking areas, accessible routes at the building exterior, and common areas inside the building. PCA360 will comment on "readily achievable" modifications and those that would be an "undue burden."



(11) *Insect/Rodent/Termite Infestation*

- (i) To the extent visually recognizable identify potential concerns and interview on-site staff about any current or historical issues.

## **Environmental Concerns**

Phase I Environmental, Indoor Air Quality & Asbestos evaluations are specifically excluded as part of this study.

## **Interviews**

Interviews should be conducted with available individuals knowledgeable with the operation of the building, including building management personnel or contractors and representatives of governmental or quasi-governmental authorities, all to the extent that these individuals are made available to PCA360 on the day of the tour.



## **The Report**

PCA360 shall provide its draft and final report in the following format:

1. Executive Summary
2. General & Detailed Description
3. General Physical Condition
4. Opinion on Probable Costs to Remedy Physical Deficiencies
5. Estimate of Immediate Repair Requirements - years 0 to 1  
Recommended immediate and current repairs or replacements, in excess of normal maintenance, which are currently needed (within 1 year) to restore a building component to satisfactory condition, and which would likely be performed by outside contractors rather than maintenance staff due to the large quantity of defects or specialized capability required. These repair items are expected to cost a minimum of \$5,000 (opinions of cost are typically in \$5,000 increments). Repairs should be categorized into deferred maintenance, accessibility and required repairs.
6. Estimate of Future Repairs – anticipated costs years 2 to 10  
Future repairs include items anticipated to become necessary within the next two to ten years, based on conditions currently observed and/or due to the typical service life of the material, equipment or systems. *Note: Cost opinions shall be order of magnitude based upon historical project experience and Consultant's experience.*
7. Photo Documentation  
Provide photo documentation consistent with ASTM Property Condition Assessment Standard 2018-15

## **Team Management**

PCA360 will assign a project executive who will oversee their work effort. A project manager will provide the day to day oversight of the project team including the sub-consultants.

- a. *Thomas Kerwin, Principal-in-charge* –will have a principal involvement in the project who will observe the quality and progress of the work and its conformance with the Project Understanding.
- b. *Gregory Walsh, Project Executive* – as project executive will be the primary point of contact with the Town of Montague. The project executive will attend all public and high level Town of Montague meetings. The project executive will be intimately involved in the project and will provide careful oversight of the project.
- c. *Brian Laroche, Project Manager & Field Observer*- will attend all job progress meetings, site property condition assessments and will manage the day to day operation of the Team, and/or other persons as necessary or appropriate.
- d. *Cost Estimator*- PCA360 has an estimator who can be used in conjunction with PCA360's unit cost database to develop estimates of specific capital improvements; the cost estimator will review the Capital Improvement Plan for each subject property.
- e. *Mechanical, Electrical, Plumbing, Fire Projection Structural Engineering* – PCA360 will retain engineering services to perform inspection of specific areas on an as needed basis as determined by the field observer conducting the property evaluation.

## **Project Deliverables**

PCA360 will provide the following deliverables to the Town of Montague:

- a. *Bound Report* – 1 Copy of the Report will be provided for each subject property with an executive summary, summary of operating costs, a 15 year capital plan, description of the building, description of observations, representative photographs as well as copies of any supporting information.



- b. *Electronic Copy*— a copy of the bound report will be provided on a USB drive in a pdf format.

#### 4. PROJECT EXPERIENCE – Representative Projects

##### Colrain Central School, Colrain, MA

PCA360 (fka Potomac Capital Advisors) was hired by the Regional School District to develop a long term capital and maintenance plan for their school buildings. This school was one of four schools that was evaluated as part of the study.

The Colrain Central Elementary School is located at 22 Jacksonville Rd., Colrain, MA 01340. The school consists of one single story elementary school building, partial basement and one external storage building located on an approximately 30 acre site which is improved with parking lots and athletic fields for baseball and soccer.

The Colrain Central Elementary School was originally constructed in 1952 and was added to and renovated in 1997. The school contains twelve classrooms, one pre-kindergarten room, one kindergarten room, a library, cafeteria with kitchen, gymnasium and administrative offices. The school is 28,006 sqft in size, serves Pre-K to 6<sup>th</sup> grade and has an enrolment of 125 students. There are two parking lots which provide parking for approximately 47 cars including two handicapped parking spaces.



##### Client

Mohawk Regional School District

##### Services

- Property Condition Assessment
- 10 Year Capital Plan
- ASTM E2018 – 05 Standard Reporting
- Document Record Research
- Personnel Interviews

##### Buckland Shelburne Elementary School, Buckland, MA

PCA360 (fka Potomac Capital Advisors) was hired by the Regional School District to develop a long term capital and maintenance plan for their school buildings. This school was one of four schools that was evaluated as part of the study.

The Buckland Shelburne Elementary School is located at 75 Mechanic Street, Shelburne, MA. The consists of one single story elementary school building and two external storage buildings land a band shell located on an approximately 30 acre site which is improved with parking lots, a basketball court and athletic fields for baseball and soccer.

The Buckland Shelburne Elementary School was originally constructed in 1958 with additions built in 1965) the "first addition") and 1999 (the "second addition"). It and contains 29 classrooms, an art room, a music, a library, cafeteria with kitchen, gymnasium and administrative offices. The school is 63,000 sqft in area, serves Pre-K to 6<sup>th</sup> grade and an enrolment of 216. There are three parking lots which provide parking for approximately 62 cars including five handicapped parking spaces.



##### Client

Mohawk Regional School District

##### Services

- Property Condition Assessment
- 10 Year Capital Plan
- ASTM E2018 – 05 Standard Reporting
- Document Record Research
- Personnel Interviews

## Mohawk Trail Regional School, Buckland, MA

PCA360 (fka Potomac Capital Advisors) was hired by the Regional School District to develop a long term capital and maintenance plan for their school buildings. This school was one of four schools that was evaluated as part of the study.

The Buckland Shelburne Elementary School is located at 75 Mechanic Street, Shelburne, MA. The consists of one single story elementary school building and two external storage buildings land a band shell located on an approximately 30 acre site which is improved with parking lots, a basketball court and athletic fields for baseball and soccer.

The Buckland Shelburne Elementary School was originally constructed in 1958 with additions built in 1965) the "first addition") and 1999 (the "second addition"). It and contains 29 classrooms, an art room, a music, a library, cafeteria with kitchen, gymnasium and administrative offices. There are three parking lots which provide parking for approximately 62 cars including five handicapped parking spaces.



### Client

Mohawk Regional School District

### Services

- Property Condition Assessment
- 10 Year Capital Plan
- ASTM E2018 – 05 Standard Reporting
- Document Record Research
- Personnel Interviews

## Sanderson Academy, Ashfield, MA

PCA360 (fka Potomac Capital Advisors) was hired by the Regional School District to develop a long term capital and maintenance plan for their school buildings. This school was one of four schools that was evaluated as part of the study.

The Sanderson Academy is located at 808 Cape Street in Ashfield, MA. The consists of one single story elementary school building and two external storage buildings located on an approximately 30 acre site which is improved with parking lots, a basketball court and athletic fields for baseball and soccer.

The Sanderson Academy was constructed in 1997 and contains twelve classrooms, two kindergarten rooms, a library, cafeteria with kitchen, gymnasium and administrative offices. There are three parking lots which provide parking for approximately 52 cars including five handicapped parking spaces.



### Owner

Mohawk Regional School District

### Services

- Property Condition Assessment
- 10 Year Capital Plan
- ASTM E2018 – 05 Standard Reporting
- Document Record Research
- Personnel Interviews

## Leverett Elementary School, Leverett, MA

PCA360 (fka Potomac Capital Advisors) was hired by the Town of Leverett to develop feasibility study for the replacement of the roof and windows on the original school building. This feasibility study was part of a green repair program initiated by the Massachusetts School Building Authority.

The Leverett Elementary School is located at 85 Montague Road, Leverett, MA 01054. The consists of a single and partial two story elementary school building located on an approximately 30 acre sloping site which is improved with parking lots, a basketball court and athletic fields for baseball and soccer.

The Leverett Elementary School was constructed three phases, 1950, 1962 and 1981 and contains twelve classrooms, two kindergarten rooms, a library, cafeteria with kitchen, gymnasium and administrative offices. The building is 42,950 sqft in size. The school enrolment is 146 children from Pre-K to 6th grade. There is one parking lot which provides parking for approximately 54 cars including two handicapped parking spaces.



### Owner

Town of Leverett

### Services

- Plan Review
- Value Engineering
- Contract Negotiation
- OPM / Project Management
- Coordination of Lender Requirements

## Heath Elementary School, Heath, MA

PCA360 (fka Potomac Capital Advisors) was hired by the Regional School District to develop a long term capital and maintenance plan for their school buildings. This school was one of four schools that was evaluated as part of the study.

The Heath Elementary School is located at 18 Jacobs Rd., Heath, MA 01346. The consists of one single story elementary school building and one external storage building located on an approximately 30 acre site which is improved with parking lots, a basketball court and athletic fields for baseball and soccer.

The Heath Elementary School was constructed in 1995 and contains six classrooms, one kindergarten room, a library, cafeteria with kitchen, gymnasium and administrative offices. The school is 25,000 sqft in area, serves Pre-K to 6<sup>th</sup> Grade and has an enrolment of 83 students. There is one parking lot which provides parking for approximately 52 cars including two handicapped parking spaces. Unfortunately, due to budget constraints and low enrolment the school was closed in 2016.



### Client

Mohawk Regional School District

### Services

- Property Condition Assessment
- 10 Year Capital Plan
- ASTM E2018 - 05 Standard Reporting
- Document Record Research
- Personnel Interviews

## St. Francis De Sales School, New York, NY

The Archdiocese of New York had closed this parish school for several years. They retained PCA360 (fka Potomac Capital Advisors) to conduct a feasibility study to determine whether it was viable to re-open the school and if so to develop a budget for repairs and improvements that would be required to recommission the school. PCA360 conducted a full property condition assessment of the building envelope, life-safety, building code, accessibility, interior environment and building mechanical systems.

As part of the evaluation PCA360 created an estimate of cost that the Archdiocese would need to invest into the property in order to bring it up to current codes for use as a school.



### Owner

Archdiocese of New York

### Services

- Property Condition Assessment
- 5 Year capital plan
- Feasibility Study for school re-opening

## Clarksburg Elementary School, Clarksburg, MA

PCA360 (fka Potomac Capital Advisors) was hired by the Town of Clarksburg to develop feasibility study for addition and renovation of the existing school building. This feasibility study was part of a core program initiated by the Massachusetts School Building Authority.

The Clarksburg Elementary School is located at 777 W Corssroad, Clarksburg, MA 01247. The consists of a single story to the front and partial two story elementary school building to the rear which is located on an approximately 40 acre sloping site which is improved with parking lots, a basketball court and playgrounds.

The Leverett Elementary School was constructed three phases, 1950, 1962 and 1981 and contains twelve classrooms, two kindergarten rooms, a library, cafeteria with kitchen, gymnasium and administrative offices. The building is 42,950 sqft in size. The school enrolment is 146 children from Pre-K to 6th grade. There is one parking lot which provides parking for approximately 54 cars including two handicapped parking spaces.



### Owner

Town of Clarksburg

### Services

- Property Condition Assessment for feasibility study
- Operating and maintenance review
- Evaluation of building for rehabilitation
- Study addition / renovation options

## Representative List of Property Condition Assessments Completed

	ESTIMATED VALUE	SQ. FT.	# BLS		ESTIMATED VALUE	SQ. FT.	# BLS
<b>BOSTON</b>				31 W 52nd	\$ 775,000,000	729,011	1
Technology Square	\$ 279,000,000	1,200,000	7	1540 Broadway	\$ 950,000,000	950,000	1
501 Boylston Street	\$ 300,000,000	660,000	1	330 W42nd Street	\$ 325,000,000	553,000	1
Hancock Tower Complex	\$ 910,000,000	3,000,000	3	597 Fifth Avenue	\$ 8,500,000	12,229	1
116 Huntington Ave.	\$ 77,000,000	265,000	1	200 Fifth Avenue	\$ 700,000,000	670,592	1
Bay Colony	\$ 272,000,000	988,000	4	195 Broadway	\$ 285,000,000	822,570	1
1100 Technology Park Dr.	\$ 35,400,000	153,713	1	1633 Broadway	\$ 2,000,000,000	2,240,000	1
253 Summer Street	\$ 34,500,000	124,000	2	St Francis De Sales School	\$ 9,800,000	23,400	1
200 State Street	\$ 167,000,000	365,000	1	575 Lexington Avenue	\$ 510,000,000	739,000	1
One Beacon	\$ 423,000,000	1,100,000	1	575 Fifth Avenue	\$ 385,000,000	533,695	1
One Financial	\$ 385,000,000	1,300,000	1	550 Madison Avenue	\$ 1,300,000,000	827,686	1
200 Newport Ave	\$ 17,500,000	146,000	1	222 Broadway	\$ 230,000,000	766,677	1
40 Court Street	\$ 37,000,000	113,176	1	Trinity Church Tirbeca Portfolio	\$ 3,550,000,000	4,961,866	7
15 Kneeland Street	\$ 54,000,000	113,295	1	85 Broad Street	\$ 650,000,000	1,100,000	1
260 Tremont Street	\$ 70,670,292	148,467	1	666 Third Avenue	\$ 800,000,000	769,948	1
49 Landsdowne Street	\$ 7,600,000	36,596	1	114 Fifth Avenue	\$ 209,000,000	305,000	1
1249-1254 Boylston Street	\$ 16,000,000	80,000	2	222 E. 41st	\$ 332,000,000	390,000	1
11 Claflin Road	\$ 1,000,000	4,500	1	218 w 18th	\$ 190,517,187	165,670	1
2036 Washington Street	\$ 6,940,700	21,356	1	245-249 W 17th	\$ 323,482,474	281,294	1
333 Longwood Avenue	\$ 29,500,000	89,700	1	<b>Stamford, CT</b>			
150 California Street	\$ 21,500,000	210,010	1	RFR Stamford Portfolio	\$ 250,950,000	717,000	3
745 Atlantic Avenue	\$ 59,500,000	170,306	1	<b>WASHINGTON, DC</b>			
180 Hartwell Road	\$ 20,000,000	499,870	6	1615 L Street	\$ 133,900,000	412,000	1
NE Regional Carpenters Union	\$ 3,600,000	32,560	5	2445 M Street	\$ 88,725,000	273,000	1
160 Federal Street	\$ 190,000,000	353,000	1	Legatto Drive	\$ 57,750,000	231,000	1
177 Huntington Avenue	\$ 59,000,000	198,825	1	Westfield Portfolio	\$ 1,000,000,000	2,800,000	11
40 Broad Street	\$ 150,000,000	291,000	1	1350 I Street	\$ 167,580,000	342,000	1
230 Congress Street	\$ 77,000,000	152,000	1	2001 M Street	\$ 49,500,000	228,849	1
95 Berkeley Street	\$ 43,000,000	114,000	1	8180 & 8200 Greensboro Drive	\$ 145,500,000	499,000	1
160 Federal Street	\$ 125,000,000	351,000	1	601 New Jersey	\$ 150,000,000	258,685	1
53 State Street	\$ 845,000,000	1,240,000	1	Terrell Place	\$ 248,700,000	428,807	1
One, Two & Ten Canal	\$ 170,000	426,000	3	700 13th Street	\$ 125,000,000	243,717	1
Channel Center	\$ 62,000,000	251,000	1	Carr America Portfolio	\$ 2,400,000,000	5,000,000	21
2 Morrissey Boulevard	\$ 72,000,000	425,000	5	1800 M Street	\$ 421,000,000	581,000	1
230 Congress Street	\$ 49,700,000	152,000	1	<b>VIRGINIA</b>			
14 Beacon Street	\$ 25,400,000	67,829	1	1310 North Courthouse	\$ 70,336,630	380,198	1
Wellesley Office Park	\$ 237,000,000	649,184	8	Hunter Branch	\$ 500,000,000	2,400,000	1
<b>CHICAGO</b>				International Place	\$ 50,875,000	275,000	1
333 W. Wacker	\$ 120,000,000	880,000	1	Pacific Corporate Cetner	\$ 145,500,000	696,377	3
222 S. Riverside	\$ 195,000,000	1,100,000	2	<b>LOS ANGELES &amp; SAN FRANCISCO</b>			
200 W. Wacker	\$ 121,000,000	725,000	1	44 Montgomery	\$ 70,336,630	380,198	1
Financial Center	\$ 260,000,000	1,000,000	1	150 S. First	\$ 50,875,000	275,000	1
Trizec/Blackstone Portfolio	\$ 500,000,000	2,400,000	4	650 Townsend	\$ 600,000,000	670,000	1
515 N. State Street	\$ 140,000,000	622,487	1	655 Montgomery	\$ 191,500,000	263,000	1
One North Dearborn	\$ 205,000,000	940,341	1	800 N. Brand	\$ 145,500,000	696,377	1
AMA Plaza	\$ 470,000,000	1,140,000	1	<b>SEATTLE</b>			
515 North State Street	\$ 138,000,000	683,000	1	Symetra	\$ 70,336,630	380,198	1
180 North LaSalle	\$ 126,000,000	769,000	1	Met Park	\$ 435,000,000	709,102	2
303 E. Wacker	\$ 182,000,000	945,540	1	Blanchard Plaza	\$ 421,000,000	581,000	1
300 S. Wacker	\$ 113,000,000	512,400	1	<b>DENVER</b>			
190 S. LaSalle	\$ 230,000,000	800,000	1	1700 Broadway	\$ 78,000,000	394,151	1
231 South LaSalle	\$ 165,000,000	936,800	1	1704 Broadway	\$ 50,875,000	275,000	1
<b>NEW YORK</b>				169 Inverness	\$ 27,000,000	67,829	1
100 Wall Street	\$ 134,000,000	463,000	1	One Tabor Center	\$ 70,336,630	380,198	3
237 Park Avenue	\$ 420,000,000	1,200,000	1	<b>SALT LAKE CITY</b>			
1211 Avenue of Americas	\$ 1,500,000,000	1,850,000	1	Gateway Center	\$ 500,000,000	2,400,000	4
Westchester One	\$ 181,500,000	880,000	1	<b>ATLANTA</b>			
32 Old Slip	\$ 870,000,000	1,100,000	1	Promenade II	\$ 208,000,000	774,000	1
450 Park Street	\$ 509,000,000	325,000	1	Woodstock Commons	\$ 7,000,000	85,500	1
370 Lexington Street	\$ 300,000,000	305,718	1	<b>FLORIDA</b>			
99 Church Street	\$ 170,000,000	441,000	1	SunTrust Center, Tampa	\$ 117,252,000	526,841	1
575 Lexington	\$ 400,000,000	610,000	1	SunTrust Center, Orlando	\$ 147,000,000	648,210	1
1330 Avenue of the Americas	\$ 498,000,000	572,300	1	<b>DELAWARE</b>			
120 Park Street	\$ 525,000,000	643,000	1	Christina 1 & 3 Wilmington	\$ 112,750,000	632,797	1
Continued				<b>\$36,476,859,173 73,600,420 169</b>			