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Town of Stoughton  
Stoughton Town Hall  
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Stoughton, MA 02072

December 15, 2024

You formed the Elementary School Building Independent Working Group (ESBIWG) as a fact-finding group to report on the May Special Town Meeting and MSBA approved Elementary School Building project. We were charged with the task of submitting a report for you, Town leaders, and the community at large to have the accurate information needed to determine how to proceed after the failed debt exclusion vote of June 11, 2024. We met weekly through the months of September and October hearing testimony from several individuals who have been involved in developing the Elementary School Building project, including Dr. Joseph Baeta, Superintendent of the Stoughton Public Schools, and representatives from Vertex (the Owner's Project Manager) and Drummey Rosane Anderson (the designer). We also heard from several community members as well as the leaders of the two Political Action Committees (PACs) that were on opposing sides of the June 11th election.

Over the past six weeks, we reviewed numerous documents about the project to put together this report, presented as a FAQ with an Executive Summary, to provide accurate information in response to the questions that emerged from numerous community members. We hope this report will help the people of the Town of Stoughton make an informed decision regarding the proposed Elementary School Building project.

Best Regards,



John Anzivino

Chairman

On behalf of the ESBIWG

Members

Jess Miner Vice-Chair

Patricia Yanikoski Secretary

Carolyn Campbell

Joseph Feaster

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Lynne McCormack

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John Roch

Marc Tisdelle

## **Executive Summary**

### **Elementary School Building Independent Working Group (ESBIWG) Findings**

The ESBIWG is a Working Group established by the Town Manager for the purpose of compiling factual information for use by the community to make an informed decision regarding the proposed elementary school building project. The Group can be reached at: [ssworkinggroup@stoughton-ma.gov](mailto:ssworkinggroup@stoughton-ma.gov)

#### **I. Problem/Situation**

The South Elementary School is in disrepair, out of compliance with Americans with Disabilities Act (ADA) and safety regulations, and beyond its capacity (by about 60 students) without room to grow. It will be closed within the next year or two if the Town does not fund a new elementary school. If the proposed project advances, the South School will remain in operation during construction of the new school, so long as it is safe to be kept open.

The Town's proposal, which has been accepted by the Massachusetts School Building Authority (MSBA), is to build a new \$113M expanded elementary school project that will expand capacity twofold (from 250-300 to approximately 600). To fund this project, the Town is asking voters to support a debt exclusion to cover Stoughton's \$66M share (to be further reduced through the sale of the South & Jones properties) with the remaining \$47M to be paid for by a grant from the MSBA (already approved).

Whether or not the debt exclusion passes, **Stoughton is undergoing a redistricting process.** All elementary school children will be affected by this process and may be sent to a different neighborhood elementary school.

#### **II. Doing Nothing is NOT an Option**

Either the debt exclusion passes, and the project accepted by the MSBA goes forward with Stoughton and Massachusetts sharing the costs, or another solution must be found and paid for solely by Stoughton taxpayers.

**A. If the MSBA-accepted project passes:** Stoughton would build the approved new \$113M school that accommodates 600 students with an MSBA grant of \$47M. The Town would need to cover \$66M and is proposing to do so through a debt exclusion and the sale of the existing South & Jones sites. The consolidated new school would open in 2029 or 2030, and the existing South would remain in operation during construction, barring unforeseen circumstances. The Wilkins would be used as a preschool and school administration site, which would not trigger the need for a full costly base repair. The debt exclusion estimated cost would be \$0.61/\$1000 valuation (i.e. \$305/year for a \$500,000 single-family home), which would be reduced once the Town acquired and sold the two properties (South & Jones). Seniors and veterans are eligible for programs to reduce the impact of these costs (see FAQ, pp.14-15). Stoughton would operate and maintain four elementary schools (Gibbons, Dawe, Hansen, new South) instead of five.

**B. If the MSBA-accepted project fails:** The most likely outcome is to add temporary (+/-10-year), modular classrooms to the Hansen, Dawe, and Gibbons schools at a cost of an estimated \$22-\$30 million plus the estimated \$46M cost of bringing the Wilkins up to code for elementary use. This would address the overcrowding issue, but the physical structures would not meet classroom needs. In all the existing schools the cafeteriums, gyms, and libraries would not be able to accommodate the increase in student body. Lunch shifts may need to start very early and be staggered over many hours. Some common areas may need to be divided and used as classroom spaces.

#### **III. Summary**

There is a substantial cost to the Town of Stoughton whether or not it passes a debt exclusion for the proposed project. The South School will close in the near future. The Wilkins will remain open and either serve elementary or preschool students, depending on the vote. The Town is redistricting all elementary school students and facing a choice between funding a new elementary school project or adding temporary modular classrooms at three sites.

## Estimated cost/benefit table to accommodate ~600 Stoughton District Elementary Students

Proposed Project	If Project Passes (Town/State split)	Options if Project Fails (Taxpayers fully responsible)		
<b>Description</b>	New Elementary School (50-yr plan)	Modulars at Dawe, Gibbons, Hansen (10-yr plan)	South School Base Repair (50-yr plan)	South School Add-Renovation (50-yr plan)
<b>Primary Costs</b>	<b>\$66M Town \$47M State  Total: \$113M</b>	<b>\$22-\$30M</b> (purchased modular classrooms)	<b>\$46M</b> (estimated to bring to code—without addition) <b>\$5-\$10M</b> rented modular classrooms during construction	<b>\$78M</b> (bring to code + addition) <b>\$5-\$10M</b> rented modular classrooms during construction
<b>Potential Secondary Costs</b>	<b>\$5-\$10M</b> interim modular classrooms if the South isn't able to remain opened throughout construction.	<b>\$46M</b> (Wilkins base repair to bring to code for elementary school)	<b>\$46M</b> (Wilkins base repair to bring to code for elementary school)	<b>\$46M</b> (Wilkins base repair to bring to code for elementary school)
<b>Cost Reductions</b>	<b>\$5-\$10M</b> sale of South & Jones sites <b>\$1-2M</b> rebates	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
<b>Results</b>	Built to last 50 years	10-year temporary fix	50-year South School fix/10 years until Wilkins base repair required	50-year South School fix/10 years until Wilkins base repair required
	Suited to educational and safety needs	Worse learning & safety environment	No improvement to learning & safety environment	No improvement to learning & safety environment
	Room for expanded enrollment	Overcrowding addressed	Overcrowding gets worse	Overcrowding remains
	All elementary students from Wilkins and portions of all other elementary students affected by redistricting	All students affected by redistricting	Many students affected by redistricting	Many students affected by redistricting
	Possibility for use of Wilkins as pre-school (costs undetermined)	Modulars displace playgrounds; children's lunch times vary widely	Reduced academic space; hallways, bathrooms, ramps expand to meet code; lunchtime variance	Addition only replaces academic space lost from base repair

*This document was prepared by the ESBIWG based upon the best information available as of 12/9/2024 and is subject to revision if additional or updated information becomes available.*

## **Frequently Asked Questions**

### **Elementary School Building Independent Working Group (ESBIWG) Findings**

The ESBIWG is a Working Group established by the Town Manager for the purpose of compiling factual information for use by the community to make an informed decision regarding the proposed elementary school building project. This project has been commonly referred to as the “South School Building” project but renaming it to the “Elementary School Building” project better reflects the reality that all elementary students will be affected by the decisions that the Town now faces. We are presenting the findings of the ESBIWG examination of the issues and associated funding as a list of frequently asked questions because we think it will be easier for those with questions to read and understand. Detailed reports from the project over the course of its history are linked through the Stoughton Schools website at the end of this document. The ESBIWG can be reached at: [ssworkinggroup@stoughton-ma.gov](mailto:ssworkinggroup@stoughton-ma.gov)

**1. What problems related to our elementary schools are we trying to solve?**

This is a two-part answer. First, the current South School is in such poor condition it will likely need to be closed within a couple years; it neither meets 21st-century learning opportunities for students nor does it support a number of federal and state regulations that align with Americans with Disabilities Act (ADA), special education, and medical privacy. Furthermore, the building does not support the current enrollment and has other physical space issues. In some cases, closets are being used as meeting and/or counseling spaces. Second, various School Committees and Superintendents have committed to a long-term plan to consolidate schools. Consolidation is defined as constructing one new school, closing the South School and Jones Early Childhood Center, and repurposing the Wilkins School as a preschool and housing the Districts Administration Offices. This will also allow for the disposal of the South School and Jones Early Childhood Center.

**2. Please provide a problem statement and the data to support the problem statement.**

The South School is outdated, in very poor condition, and has significant physical and space issues for today's students and their needs. The South Elementary School building was completed in 1958, with 14 classrooms, administrative offices, and a cafetorium. The school is a single-story building built on five separate levels because the designers were attempting to integrate the building into a sloped site with ledge outcroppings. An addition was completed in 1967, adding six regular classrooms, two special purpose classrooms, a library, and a gymnasium. Major renovations to South School have included: (a) a partial roof replacement, 1999; (b) removal and replacement of all asphalt surfaces, 1998; (c) partial window replacement, 2001 and 2014; (d) phone switch and voicemail replacement, 2009; and (e) systemwide Voice Over Internet Protocol (VOIP) phone system upgrade (2019). Open capital projects on all elementary schools, including the South and Wilkins Schools includes: (a) Video surveillance upgrades to all elementary schools; exterior outward facing cameras in driveways, playgrounds and parking areas (2022 Special Town Meeting (STM)). (b) Intrusion alarm upgrades and interior door hardware (2023 STM).

There are numerous problems with the current South School building. These problems include the many physical problems as well as an outdated functional layout that does not comply with numerous federal and state regulations that target ADA, special

education and medical privacy (none of which were concerns when the building was constructed.) It also does not provide a satisfactory educational environment to meet the needs of its current enrollment, which at over 300 students, exceeds the building's capacity of 247 students. The primary reason for this failure is a combination of the age of the building, a growth of the student population and changes in the regulatory environment.

- a. The South School building is not ADA compliant and cannot be made ADA compliant without reducing the capacity of the school significantly. The primary reason is the layout of the building, which includes four (land-height-level) grade changes, and the site of the building, which is built on ledge.
- b. The heating and electrical systems are original to the building. Less than 5% of the total building has air conditioning. The flooring is a mix of Vinyl Composite Tile and Vinyl Asbestos Tile.
- c. Poor site drainage and building placement causes frequent water intrusion and there are rooms where dehumidifiers or air conditioners must run nonstop. Most windows and some doors leak water and cold air in inclement weather. The hallway by the library and several rooms in that area constantly have a mold smell. The roof leaks and has been frequently repaired. The cost of replacing the roof is large enough to trigger the Architectural Access Board (AAB) regulations requiring the school building be brought up to code and made fully ADA compliant. (See 521 Commonwealth of Massachusetts Regulations). The cost of making the South School ADA compliant and brought up to code is estimated to be about \$46M today.
- d. To install a computer network, the original library was converted to a server room with an exposed rack and network cables, which then run along the ceiling and walls throughout the building. This server room is the only room in the building large enough to accommodate Individual Education Plan (IEP) meetings for staff and parents, and the noise and heat generated by the servers create privacy concerns as people must speak loudly to be heard over the machinery.
- e. The nursing clinic does not comply with current standards. It is housed in a former storage space with only one bed and no privacy for screening students or for private phone conversations with parents. The bathroom in the clinic only has a toilet and is also used as private space for administering injections.
- f. The administration office is extremely small leading to frequent privacy issues. Its location is on a midway level, making access difficult. It is also a distance from the front door, making security more difficult to manage.
- g. There is not sufficient office space for several therapists/teachers/staff. Closets have been converted to office space for the speech language therapist and the school counselor. The physical education teacher uses an equipment closet for an office and storage space.
- h. The cafeteria space is small and cannot accommodate the whole school, which impacts the ability to hold the "whole school" events necessary to build community.
- i. The gymnasium is extremely small and can only accommodate one class at a time. In addition, contemporary physical education programs and community events are impossible due to the size of the gym.
- j. The current library media center is in an 800 square foot room that is much smaller than in other elementary schools, and which can only accommodate one class at a time and prevents students from using it unless their class is scheduled to do so. The size also limits the number of books and technology

available.

- k. The South School was built before schools were required to provide additional services such as special education, English Language Learning, social and emotional support and technology. There is limited classroom space for small groups and 1:1 instruction, and that space was created by dividing some standard classrooms into two small group classrooms.
- l. All South School classrooms are smaller than contemporary standards, lack storage space and have limited counter space. This limits the instructional activities and often leaves the rooms cluttered and tight. In addition, the layout of the building classrooms promotes isolation and separation of faculty and students, which is the antithesis of the collaboration that marks a healthy learning environment.

### **The Wilkins School**

While in better physical condition than the South School, there are several building deficiencies that make the Wilkins less than desirable to continue as an elementary school. In its current state, it does not provide all of the same educational options available to students at the other three elementary schools (Dawe, Hansen and Gibbons).

- a. The Wilkins Elementary School takes up approximately 4.4 acres of an 11.6 acres parcel owned by the Town and used for softball fields and other recreational purposes. The site is bordered on one side by housing and the other side by the Stoughton District Court. There is no room to expand the footprint of the building without encroaching on the neighbors or taking over the recreation fields.
- b. The original building was designed for approximately 288 students. Its enrollment for 2023-2024 was 333 students. In 2022, the enrollment was 290 students.
- c. There are some accessibility issues, which will need to be addressed.
- d. The classrooms are undersized and do not provide the space necessary to support elementary school students.
- e. Heating is provided by two steam boilers that are original to the building. Less than 5% of the building is air conditioned.
- f. The electrical service is original to the building.
- g. Flooring consists of a mix of Vinyl Composite Tile (VCT) and Vinyl Asbestos Tile (VAT). There is carpeting in the Learning Commons and in administrative offices.
- h. The Library Media Center has been converted to a Learning Commons (a space for student collaboration, typically within a library), reflecting a philosophy being applied to all elementary schools except for the South. While this space is just over 1000 square feet, it is made up of three smaller spaces with uneven floors and no direct site lines. As a result, students cannot meet as a class for any read aloud or other whole class instructional activities.
- i. The art room is large but is in a windowless basement area. It is subject to moisture and has a large dehumidifier always running to alleviate the moisture problem. The dehumidifier is loud and distracting for everyone.
- j. The cafeteria is approximately 2000 square feet, but it is awkwardly laid out. It has a low ceiling and closely spaced columns making table placement difficult. The kitchen has had to take over a large area for dry good storage due to a lack



of storage space in the kitchen itself.

- k. The kitchen is severely undersized for a school of this size and there is limited building space to expand.
- l. The gymnasium is smaller than what is expected and may only be used as a half-basketball court due to the location of the stage.
- m. Neither the cafeteria nor gymnasium are large enough to host the entire school community for any type of assembly or programming.
- n. There are no science rooms or labs which are needed to support the curriculum.

**3. What does the Town need to address the problems?**

First and foremost, the Town needs a school building that meets the needs of today and for at least the next 50 years. Second, the Building Committee created a significant three-part rationale for working with the MSBA and received a state grant. This included a full renovation, a renovation and addition and a new school. It was clear that the new school was the best option based on the MSBA process and their grading of the physical plant.

**4. Why does the Town need to address these problems?**

To move forward, we have two major issues to address. First, by building a new consolidated school, we can provide for long-term sustainability and not have to continue to build new elementary schools. Consolidation would enable the most financially efficient way to provide space for all elementary students, would allow reuse of an existing school for pre-K uses, and enable the town to sell two surplus school properties. Second, this would allow for the work to begin on a new Middle School at some point after June 2038 when the High School loan is paid off. The Middle School would be the last new school building construction project required within the next 50 years.

**5. Past, current, and projected student body numbers including impact of influx of families to Stoughton and any costs offset by federal/state support.**

	South School Enrollment	District PreK-5 Enrollment
FY24	293 (ended year at 312)	1756 (ended year at 1814)
FY23	281	1690
FY22	253	1621
FY21	237	1543
FY20	234	1604

Projected Enrollment for PreK-5 Education as per The New England School Development Council (NESDEC) Report of Fall of 2023 projects 1,846 students by 2028 (this does not include the preschool waitlist). Overall, PreK-12 enrollment projections equate to 3,907 students by 2028. The superintendent is unable to estimate changes in enrollment based on migrant student numbers (we receive an additional \$104 per day per migrant student for those enrolled after October 1, 2023). We do not receive any additional federal or state grant funding for non-migrant students who add to our enrollment numbers.

**6. What major maintenance has been done on the South and Wilkins schools in the past twenty years?**

**South School:** An addition was completed in 1967, which added six regular classrooms, two special purpose classrooms, a library, and a gymnasium. Major renovations have included a partial roof replacement, 1999; removal and replacement of all asphalt surfaces, 1998; partial window replacement, 2001 and 2014; phone switch and voicemail replacement, 2009; and systemwide VOIP phone system upgrade (2019).

**Wilkins School:** The Wilkins Elementary School opened as the West Elementary School in 1951. A two story, seven classroom, four restroom addition was added in 1954, and a two story, four classroom, three office addition was added in 1962 for a total of 47,662 square feet. Most recently the Wilkins completed an MSBA accelerated repair roof replacement in 2016 and an MSBA accelerated repair windows and doors replacement in 2019. Town Meeting also funded total replacement of all eight student restrooms in 2020.

**7. Why should we invest so much Town and State money on one elementary school?**

The proposed project solves district-wide capacity issues, meets the needs of 21st-century learning for the next fifty years, and is a cost-effective option in terms of long-term fiscal planning for new elementary school building projects. Kicking the can down the road will only create more hardship in terms of costs for the Town's taxpayers, the State, and more hardship for the students.

**8. Is it possible to build a new elementary school for \$30M?**

We have not seen a concrete proposal or plan to build a new school for \$30M. Site preparation work alone has been estimated at \$17M, which makes a total construction cost of \$30M unfeasible.

**9. How would you respond to the residents who have expressed that the school is too extravagant in its design?**

The intent of all public-school building projects is to create a 50+ year plan that impacts not only the education of children but the financial benefit of having buildings that are more efficient and meet the goals of the community. The solution for this project is not extravagant as it meets the educational plan, long-term planning including fiscal planning and the direct needs of being the first elementary school in Stoughton that fulfills special education regulations since the implementation of Individuals with Disabilities Education Act (IDEA) in the 1970s. The only major cost increase over other current MSBA projects is the site design, which is higher than most other projects because of the physical nature of the site and access to it (which alone is projected to cost approximately \$17M). The building design was based on the district's current-century educational plan which includes Science, Technology, Engineering and Math (STEM) education; problem-based learning classrooms; spaces for special education and multi-language programs; a learning commons (a space for student collaboration, typically within a library); various other collaborative spaces; and the ability to group grade levels together. In addition, the



design of the building takes into consideration security issues that were not present when the other elementary schools in the district were built. The bump outs and curved hallways look “fancy” but they have valid security purposes; they help to protect the occupants of the school from an outside attack by interrupting the line of sight for an active shooter. Finally, the mock-up site plans included a sketch of some amenities, such as pickleball courts, but these can be removed from the design as they do not impact the educational plan of the building. The proposed recreational and landscaping plans are not currently finalized.

**10. If there is an April 2025 vote and it passes:**

If the Town passes the \$66 million debt exclusion, Stoughton will build the approved new \$113 million elementary school that can accommodate 600 students with an MSBA grant of \$47million from the state. The Schools will undergo redistricting regardless of the outcome of the vote. The new elementary school would meet modern educational needs, would open in 2029 or 2030 (based on the delay) and the current South School would remain in operation during construction, barring unforeseen circumstances. This proposal would accommodate all elementary school students and result in the operation and maintenance of four elementary schools: the new elementary school, the Gibbons, the Dawe, and the Hansen.

**A. What would happen to the current South, Jones, and Wilkins Schools?**

The School Department has agreed that, once the new elementary school opens, the current South School and the Jones Early Childhood Center will be closed, and those properties will be relinquished back to the Town. The Town would sell the properties, thus eliminating the high costs of operating and maintaining these two buildings. The Wilkins would remain open but would be converted to a preschool and would house the Administration Offices (currently located in the Jones School). This would enable an increase in capacity for the PreK program, which currently has a waiting list of over 90 students. The Town would then initiate a process for selling the current South and Jones School properties and putting the net proceeds towards the new elementary school project cost. The process would be as follows:

1. Town Meeting approves the new elementary school and appropriates sufficient funds subject to a debt exclusion ballot question.
2. Once the new school opens, the School Department closes the South School (171 Ash Street) and the Jones (137 Walnut Street).
3. Town Meeting transfers both properties to the Select Board, under G.L. c. 40, s 15A, for municipal uses, including disposition, noting that upon any sale of the properties, any net proceeds shall be used to offset the costs of the new Elementary School Project.
4. The Select Board declares the properties surplus under G.L. c. 30A and begins the procurement process for sale. The Select Board drafts a Resolution memorializing Town Meeting’s mandate and adopting a proclamation that upon any sale of the properties, any net proceeds shall be used to offset the costs of the new Elementary School Project.
5. The Town sells the two school properties, and these funds are deposited into the general fund. The Select Board then prepares and includes a Town Meeting warrant article appropriating the proceeds to offset the costs of the new Elementary School Project.

**B. Are any building improvements required?**

The South and Jones would be sold “as is”. Upgrades to the Wilkins HVAC and electrical systems will need to be considered in the future, but not necessarily in advance of conversion to a preschool. The windows and roof were recently completed, along with bathrooms, painting etc.

**11. If there is an April 2025 vote and it fails:**

The Schools will undergo redistricting regardless of the outcome of the vote. The most likely outcome of a “no vote” is to add temporary (10-year), modular classrooms (leased or purchased) to the Hansen, Dawe, and Gibbons Schools at a cost of an estimated \$22-\$30M plus the estimated \$46M cost of bringing the Wilkins up to code for use as an elementary school. This will lead to a significant increase in transportation costs, potential increases in out-of-district placements for special education. At the Gibbons and Dawe, modular classrooms would occupy playground spaces. At the Hansen, modular classrooms would occupy parking spaces, which would need to be relocated. The physical structures would not meet classroom needs. In all the existing schools, the cafeteriums, gyms, and libraries are not designed to accommodate the increase in student body. Lunch shifts may need to start very early in the morning and be staggered over many hours. Some common areas may need to be divided and used as classroom spaces. Refer to the table in the executive summary.

**A. What happens to the South, Jones, and Wilkins Schools?**

The South would be closed within the next couple of years. The Jones would continue to be used as a preschool and as the District Administration offices. This outcome forestalls the possibility of building consolidation. The Town would continue to absorb the costs of maintaining the Jones, which, along with the South in its current state, is the most expensive in terms of operations and maintenance (rather than having the option to sell both properties). The Wilkins would remain open as an elementary school rather than being converted to a preschool and the District Administration offices.

**B. Can we just repair the schools or leave them “as is”?**

Repairing schools and leaving schools “as is” are two different things. Schools being left “as is” would be very risky. The laws and regulations are somewhat silent except when a major environmental issue or physical plant issue happens, triggering a shutdown. Repairing schools may trigger the need to do a complete base repair to bring them to code which would reduce the size of the learning space, and cost tens of millions (estimate for the South is more than \$46M). The South School is currently in need of major repairs, though while it may be possible to squeeze a few more years of service out of it while a new school is constructed, it will not last longer. Leaving the school “as is” without doing anything to fix the physical and/or accessibility problems will also put the Town at risk of lawsuits. Moreover, the inability to place a student in their home-school can create mandated requirements and increase other costs, such as having to pay for out-of-district placements.

**12. What will happen to the students at each School? What is the plan for redistricting and when?**

The School Committee has already appointed a Redistricting Committee in the fall of 2024. The full redistricting plan will proceed regardless of the vote, but the details of the

plan are dependent on the outcome of the Town's decision regarding the potential April 2025 vote on the debt exclusion (i.e. it is still uncertain whether elementary students will be assigned to four existing schools with modulars, or four schools that include the new elementary school with increased capacity). A full redistricting plan will be completed for the fall of 2026 at the earliest.

**13. What happens if we do nothing? Is that even an option? What would the implications be for students, services, buildings, taxes, property values, funding?**

Doing nothing is not an option. If the new elementary school is not built, the town will need to incur other expenses related to addressing capacity needs.

The implications for:

**A. Students**

The implications for students if we do not build an elementary school include overcrowding, continued issues with special education, English Language Learner (ELL) education, counseling and nursing privacy and rights, and classroom sizes that are already smaller than required. Many students will be placed in temporary, modular classrooms.

**B. Services**

The South School service delivery model is already an issue with a significant strain in supporting ADA compliance, privacy, and specialized support services and spaces.

**C. Buildings**

The existing South School building is antiquated for 21st Century teaching and learning. The list of issues is noted in the Statement of Interest for the South Elementary School.

**D. Taxes**

42% of the project costs (\$47M) would be reimbursed by the MSBA only if we proceed with the current proposal and the remaining 58% (\$66M) would be paid for by the taxpayers through a debt exclusion that would extend over a 20-30 year borrowing period; this could be further reduced by the sale of the South and Jones Schools. If we do nothing now, the costs to taxpayers would increase if we lose out on the MSBA funding, and construction costs will continue to increase. Interest rate fluctuations could affect project costs positively or negatively.

**E. Property values**

The fact is that schools add to property values with most recent research noting a \$20 increase for every \$1 spent on education.

**F. Funding**

The idea behind this project is to solve the current elementary school problems and not be building new elementary schools in the future, thereby supporting more efficiencies within the budget process. It may also become more difficult to work with the MSBA to get needed school building grants in the future, if Stoughton walks away from the current MSBA-approved elementary school proposal.

## Site & Design Considerations

### 14. A. Why isn't the Town considering a Model School Plan?

A Model School Plan (MSP) refers to a pre-designed school building plan that the MSBA originally provided as a cost-effective, efficient, and adaptable design for addressing different school needs. It used to be that you could pick up reimbursement incentive points for working in the MSP, but in 2016 the MSBA removed the incentive points. Since then, there has been no increase in reimbursement for using the MSP. Also, the MSBA has not approved a model school since 2012 and is reevaluating the program. Even when using a model school design, significant adjustments are usually necessary based on specific site conditions and educational needs. The MSBA has determined making the building fit the education plan was very important. In addition, technology is changing rapidly, affecting the design of things such as lighting and mechanical systems in new buildings. Model schools were determined not to meet Stoughton's educational needs and were therefore ruled out.

### B. How did Stoughton decide on the current site and school proposal?

The South School Building Committee started its feasibility study in 2022. As part of that study, they considered 12 different sites within the Town that were possibly large enough to build a school. Of the 12 different sites, there were 10 options that were considered at length with costs for development delineated, as required by the MSBA.

### Four options were considered in depth (all numbers from Vertex):

1. Conduct Base Repairs of both the current South School and Wilkins School. Base repairs would bring the buildings up to code, making the South School ADA compliant. It would not change the footprint, nor would it increase capacity. Given that classroom space would need to be taken away to make some of the ADA changes at the South, it would decrease enrollment capacity. The estimated total project cost for the base repair of the South is \$46,432,597. The estimated total project cost for the base repair of the Wilkins is \$46,066,479. **The total cost for both base repair projects is \$92,499,076 and would not be eligible for MSBA funding.**
2. Renovation and Repairs to the current South School. This plan would modernize the current South School. Even with the addition, the design does not expand classroom capacity to accommodate increases in enrollment. **This option was priced at \$78,758,048** and would produce a renovated school building that would not address the current elementary enrollment problem. There would need to be a new building built at some point in the next 20 years.
3. Renovation and Repairs at the current Wilkins School. This plan would modernize and expand the capacity of the Wilkins to house 515 students by expanding outward. **This option was priced at \$106,779,976** (comparable to the new construction costs, but the full cost would fall on Stoughton taxpayers) plus costs associated with educating the Wilkins students while construction was ongoing. This option would address the current elementary enrollment problem, but the Jones would need to remain open as a PreK site and the growing PreK waiting list would remain a problem. The Town might still need to build a new school in approximately 20-25 years since further expansion through additions

would not be possible.

4. The plan ultimately approved by the MSBA was a new elementary school, designed for at least 515 students (per MSBA; capacity is 600), located in the South School district. This plan would result in a new elementary school that can serve up to 600 students, allowing the School department to consolidate its elementary schools into four buildings and to free up the Wilkins to be used for the preschool program and School administrative offices. It also has the capability to be further expanded through addition if elementary student enrollment continues to increase. The building would last for at least 50 years and, according to the school department, would be the last new construction for an elementary school for several decades. **This option has been priced at \$107,992,528 and has been approved for a MSBA grant to cover up to \$47,930,405 of the total. The Town would be responsible for \$60,062,123 plus approximately \$6M in contingency fees.**

#### **Cost/funding considerations:**

#### **15. A. Why not wait 10 years until 2034 to do this project?**

It will cost taxpayers more. The cost of an elementary school in 10 years will be at least 30 – 40% more, due to construction costs rising faster than inflation; in addition, the Town could be less likely to receive MSBA support since it would have turned back the funding for the current proposed project. We will have to provide for modular classrooms which will cost millions of dollars as a stop-gap measure and are not in the best interest of student learning or long-term planning.

#### **B. Please explain how the debt exclusion works.**

A debt exclusion is a temporary increase in taxes to pay off debt service for a specific project, such as building a school. The debt exclusion is only added to the levy limit for the life of the loan. Debt exclusions require a two-thirds vote at a Town meeting and a majority vote at the following Town election.

#### **1. What project costs would the \$66M cover and what restrictions are there on what the money can be used for?**

The final recommendation is inclusive of all building construction and outfitting costs, including technology, desks and chairs, etc.

#### **2. What will the impact be on taxpayers? Will the amount fluctuate for taxpayers over time?**

Based on the review that Hilltop Securities (the Town's financial advisor) conducted of Stoughton's debt profile on April 30, 2024, the new elementary school project would add 61 cents per \$1,000 of valuation to a person's annual tax bill. This assumed a 30-year loan at a 4.5% interest rate. For example, the tax bill would **increase by approximately \$305 annually (roughly \$75/quarter)** for an average residential **property valued at \$500,000**. This amount would be further reduced by the sale of two school properties, the South School and the Jones.

Based on the Hilltop Securities review, this project will cost approximately \$4 million per year and would remain level at this amount over the 30-year note. If this project were to be paid through the debt service in the Annual Town budget that amount would reduce the revenue available for personnel (e.g. police, firefighters, teachers, etc.) and services (e.g. visiting nurse services, recreation offerings, programs for seniors and veterans, etc.).

If the project fails, the alternatives listed in the chart below would cost anywhere from \$3 million to \$5.5 million annually, which would still need to be absorbed into the debt service in the town budget, resulting in substantial cuts to town services.

**3. Could we split the costs to taxpayers by paying for some through the debt exclusion and putting some in the budget, like we did with the Fire Station?**

Here's the problem with this approach to funding the project: if a portion of the cost is inside the levy, we would eat up free cash, requiring the use of debt to fund other capital needs. The debt on other capital needs, such as Town vehicles, tend to be for shorter terms at higher interest rates. Free cash fluctuates and is not a reliable or predictable sole source of revenue. Using free cash in this way could have a negative effect on our bond rating. And if we don't use free cash, we would need to eliminate and/or reduce several Town services including personnel, to cover such a large amount of debt.

**4. How will the projected timeline for a South school project debt exclusion overlap with current debt payments on other Town buildings & repair projects, including SHS, the library, and the fire station?**

Proposed New Elementary School: 2028-2057 (30 years)

Stoughton High School: loan ending 6/30/2038 (14 more years)

Fire Station: loans ending 6/30/2052 (28 more years)

Library has three separate loans and is paid in the debt service in the budget: loans ending 6/30/2035; 6/30/2038; 6/30/2039 (11-15 more years)

**Estimated cost/benefit table to accommodate ~600 Stoughton District Elementary Students**

<b>Proposed Project</b>	<b>If Project Passes (Town/State split)</b>	<b>Options if Project Fails (Taxpayers fully responsible)</b>		
<b>Description</b>	New Elementary School (50-yr plan)	Modulars at Dawe, Gibbons, Hansen (10-yr plan)	South School Base Repair (50-yr plan)	South School Add-Renovation (50-yr plan)
<b>Primary Costs</b>	<b>\$66M Town \$47M State  Total: \$113M</b>	<b>\$22-\$30M</b> (purchased modular classrooms)	<b>\$46M</b> (estimated to bring to code—without addition) <b>\$5-\$10M</b> rented modular classrooms during construction	<b>\$78M</b> (bring to code + addition) <b>\$5-\$10M</b> rented modular classrooms during construction
<b>Potential Secondary Costs</b>	<b>\$5-\$10M</b> interim modular classrooms if the South isn't able to remain opened throughout construction.	<b>\$46M</b> (Wilkins base repair to bring to code for elementary school)	<b>\$46M</b> (Wilkins base repair to bring to code for elementary school)	<b>\$46M</b> (Wilkins base repair to bring to code for elementary school)
<b>Cost Reductions</b>	<b>\$5-\$10M</b> sale of South & Jones sites <b>\$1-2M</b> rebates	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>
<b>Results</b>	Built to last 50 years	10-year temporary fix	50-year South School fix/10 years until Wilkins base repair required	50-year South School fix/10 years until Wilkins base repair required
	Suited to educational and safety needs	Worse learning & safety environment	No improvement to learning & safety environment	No improvement to learning & safety environment
	Room for expanded enrollment	Overcrowding addressed	Overcrowding gets worse	Overcrowding remains
	All elementary students from Wilkins and portions of all other elementary students affected by redistricting	All students affected by redistricting	Many students affected by redistricting	Many students affected by redistricting
	Possibility for use of Wilkins as pre-school (costs undetermined)	Modulars displace playgrounds; children's lunch times vary widely	Reduced academic space; hallways, bathrooms, ramps expand to meet code; lunchtime variance	Addition only replaces academic space lost from base repair



**16. Other possible savings for this project?**

**A. Is there any anticipated funding from the State or Federal Government to support school structures and services related to the influx of families with school-aged children?**

No.

**B. What are the property values of the South, Jones, and Wilkins schools?**

Approximate range falls between \$5.2M - \$6.8M valuation for each property.

**C. What are the efficiency-related rebates and incentives we can expect to receive for the current project as designed?**

\$1.5 - \$2M in rebates and savings that would lower the Town's share of the total costs.

**D. Is there an opportunity for any additional funding from MSBA (beyond what has already been committed, pending Town approval of the project) or from any other sources?**

No.

**17. Implications:**

**A. What is the correlation between quality of schools and property values?**

Typically, for every dollar spent on education there is a correlation of increased property values. We have seen this in Stoughton with the new high school. The latest research shows that, for every \$1 dollar spent on education, property values increase by \$20.

**B. How does this project fit into the overall capital plans for the Town and the Schools? What other projects are on the horizon that may add further cost pressure on the Town and the taxpayers?**

The Town and Schools are trying to space out large capital investments by building out a new 10-year capital plan so as not to put as much strain on the taxpayers. The joint planning process will be under way in the spring of 2025 and the joint capital plan will be ready for fiscal year 2027 which begins 7/1/2026.

The next two projects that are coming up are a renovation/expansion of the Police Station and a new Middle School to replace the O'Donnell Middle School (OMS). The Police Station feasibility study is underway and could be brought forward at the May 2025 Annual Town Meeting. The OMS project is not expected to proceed before the High School is paid off (6/30/38).

**C. What are the anticipated timelines associated with the other elementary and middle schools to be repaired or rebuilt?**

OMS would be next with a Statement of Interest filed in 2029-2031 followed by MSBA approval and potentially starting construction by 2040. The remaining elementary schools would come after the OMS, and those would be renovations/additions and not new construction.

**D. If this project does not affect my family personally (or if I don't have school-aged children), why should I pay?**

Whether or not the project moves ahead, the Town will still need to provide a safe and educationally sound learning environment for its children. If the debt exclusion does not pass: 1) the alternatives may not be less expensive, 2) there would not be any MSBA funds to offset costs, and 3) the alternative space will not meet the educational needs of the students and will adversely impact all elementary school students within the Stoughton School system. In addition, there are various public goods and services a town provides for its residents, who may utilize some of these services and not others—yet they are necessary for a functioning community. Families with small children may utilize ambulance services less often than residents who are no longer school-aged, yet a community must fund both. Lastly, as stated above, there is a positive correlation between the quality of schools and property values.

**E. How can seniors and veterans obtain relief from associated increases in taxes?**

There are a number of statutory and local programs that provide relief to certain qualified taxpayers, in particular seniors and veterans. A summary of those programs is provided below, and more information can be found at:

- [www.mass.gov/doc/guide-to-real-estate-tax-exemptions-for-qualifying-veterans-0/download](http://www.mass.gov/doc/guide-to-real-estate-tax-exemptions-for-qualifying-veterans-0/download)
- <https://www.mass.gov/doc/qualifying-surviving-spouses-minor-children-and-elderly-persons/download>
- [www.mass.gov/doc/qualifying-persons/download](http://www.mass.gov/doc/qualifying-persons/download)
- [www.mass.gov/doc/taxpayers-guide-to-local-property-tax-exemptions-seniors-clauses-41-41b-41c-41c12/download](http://www.mass.gov/doc/taxpayers-guide-to-local-property-tax-exemptions-seniors-clauses-41-41b-41c-41c12/download)

Applications for relief from property taxes are available at the Town Assessor's Office.

1. G.L. c. 56, § 5K (Senior property tax work off program)
2. G.L. c. 60, § 3D (Aid to elderly and disabled taxation fund; voluntary check off donations)
3. G.L. c. 60 §3F (Veterans assistance fund for voluntary donations)
4. G.L. c. 59, § 5N (Veteran work-off abatement)
5. G.L. c. 59, § 5(41, 41B, 41C)(Exemption for seniors of \$500; may be increased to \$1000 by Town Meeting)
6. G.L. c. 59, § 5(41A)(Real estate tax deferral; entire bill is delayed until sale of home or passing of tax payer)
7. G.L. c. 59, § 5(41C)(Real estate tax deferral up to \$1000/yr for seniors)
8. G.L. c. 59, § 5(41C½)(Exemption for seniors of 5% of the average assessed valuation of residential property; may be increased up to 20% of the average assessed valuation of residential property by Town Meeting)
9. G.L. c. 59, § 5(18-18A)(Extreme hardship exemption gives taxpayers the ability to defer up to 100% of their property taxes. This deferral is available for up to 3 consecutive years and must be repaid beginning 2 years after the last year of deferral)
10. G.L. c. 59, § 5(17, 17C, 17C½ and 17D)(Seniors who are at least 70 years old, minor children with at least one deceased parent and surviving spouses may be eligible for relief up to \$175/yr. Town Meeting may increase this amount annually by an amount not to exceed the increase in the Consumer Price Index)
11. G.L. c. 59, § 5(22, 22A, 22B, 22C, 22D, 22E, 22F and 22H)(Real estate tax relief for veterans ranging from \$400 to the full tax)

12. G.L. c. 59, § 5(37)(Real estate tax exemption of \$437.50 under Clause 37, or \$500 under local option Clause 37A for blind persons)
13. G.L. c. 59, § 5(42, 43)(Surviving spouse of police officer or firefighter who have not remarried, and minor children, are eligible for a full exemption.)
14. G.L. c. 59, § 5(56)(Members of the Massachusetts National Guard and military reserves may qualify for an exemption of up to 100 percent of their real and personal property taxes.
15. G.L. c. 59, § 5(57)(By local option and subject to annual appropriation by the community's legislative body, seniors who qualify for the Massachusetts income tax credit called the "circuit breaker" may qualify for an exemption.)
16. G.L. c. 44B, § 3(e)(Community preservation act surcharge abatement)
17. G.L. c. 83, § 16G (deferral of sewer charges if such owner is receiving an exemption from property taxes under clause 41A)
18. G.L. c. 40, § 42J (deferral of sewer charges if such owner is receiving an exemption from property taxes under clause 41A)

**F. Where can I go for more detailed information on the proposed project?**

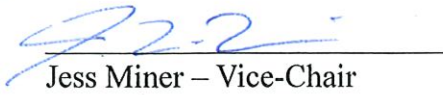
The School leadership has collected all relevant documents at the following link:

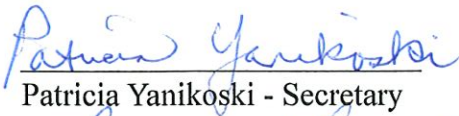
<https://www.stoughtonschools.org/documents/south-school-building-project/272931>

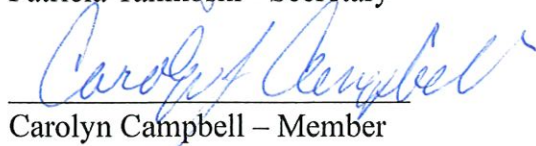
*This document was prepared by the ESBIWG based upon the best information available as of 12/9/2024 and is subject to revision if additional or updated information becomes available.*

# ELEMENTARY SCHOOL BUILDING INDEPENDENT WORKING GROUP

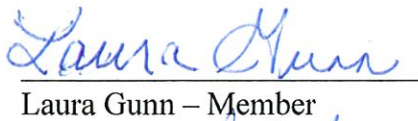
  
John Anzivino – Chair

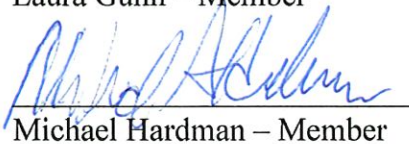
  
Jess Miner – Vice-Chair

  
Patricia Yanikoski - Secretary

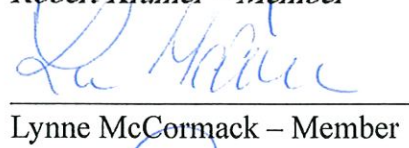
  
Carolyn Campbell – Member

  
Joseph Feaster – Member

  
Laura Gunn – Member

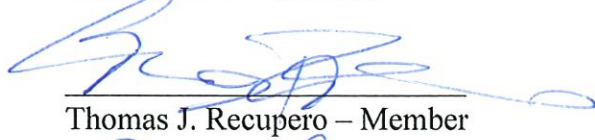
  
Michael Hardman – Member

  
Robert Kramer – Member

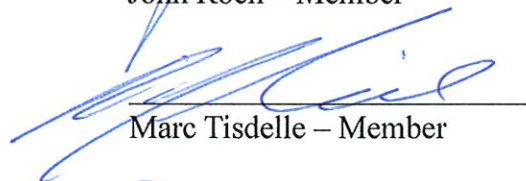
  
Lynne McCormack – Member

  
Lauren Morris – Member

  
Mark Racicot – Member

  
Thomas J. Recupero – Member

  
John Roch – Member

  
Marc Tisdelle – Member

DECEMBER 15, 2024  
Date