



CITY OF MELROSE
APPROPRIATIONS & OVERSIGHT COMMITTEE
AGENDA • NOVEMBER 7, 2022

Council Chamber, First Floor, Melrose City Hall Committee Meeting
562 Main Street, Melrose, MA 02176

7:00 PM

I. CALL TO ORDER

Jen Grigoraitis	Chair
Leila Migliorelli	Vice Chair
Shawn M. MacMaster	
Jack Eccles	
Mark Garipay	
Maya Jamaledine	
Robb Stewart	
Manjula Karamcheti	
John Obremski	
Ryan Williams	
Christopher Cinella	President, ex officio

II. PUBLIC COMMENT

Remote Public Comment Link:

<https://cityofmelrose-org.zoom.us/j/99081483447?pwd=Nm1hT3R1Z3l2cWJ3bTZkdVBzbW1Kdz09>

III. ORDERS

1. **ORDER-2023-27** : Authorization of a Bond in the amount of \$1,460,177.00 to pay for costs of replacing the roof at the Horace Mann Elementary School, Fund #3392

Offered by: Mayor Paul Brodeur

From: City Council

ASSIGNED TO COMMITTEE

2. **ORDER-2023-28** : Authorization of a Bond in the amount of \$2,306,449 to pay for costs of replacing the roof at the Herbert Clark Hoover Elementary School, Fund #3391

Offered by: Mayor Paul Brodeur

From: City Council

ASSIGNED TO COMMITTEE

3. **ORDER-2023-30** : An Appropriation in the amount of \$72,170 (Seventy-Two thousand, One Hundred Seventy Dollars) to fund Fiscal 2023 of the Local-272 Clerical Union Contract. The requested appropriation is from the following accounts \$63,378 from the Contract Stabilization fund (84042-590000), \$4,396 from Sewer, Reserve for Retained Earnings (84152-590000) and \$4,396 from Water, Reserve for Retained Earnings (84162-590000) to various salary and wage lines as set forth herein.

Offered by: Mayor Paul Brodeur

From: City Council

ASSIGNED TO COMMITTEE

4. **ORDER-2023-31** : An Appropriation in the amount of \$68,816 (Sixty Eight Thousand, Eight Hundred Sixteen dollars) to fund Fiscal 2023 of the Local-272 Laborers Union Contract. The requested appropriation is from the following accounts \$50,522 from the Contract Stabilization fund (84042-590000), \$8,080 from Sewer, Reserve for Retained Earnings (84152-590000) and \$10,214 from Water, Reserve for Retained Earnings.

Offered by: Mayor Paul Brodeur

From: City Council

ASSIGNED TO COMMITTEE

5. **ORDER-2023-29** : An Appropriation in the amount of \$167,310 (One Hundred Sixty-Seven thousand, three hundred and ten dollars) to fund the HRS compensation study. The requested appropriation is from the following accounts \$159,784 from the Contract Stabilization fund (84042-590000), \$3,763 from Sewer, Reserve for Retained Earnings (84152-590000) and \$3,763 from Water, Reserve for Retained Earnings (84162-590000) to various salary and wage lines as set forth herein.

Offered by: Mayor Paul Brodeur

From: City Council

ASSIGNED TO COMMITTEE

IV. GRANTS

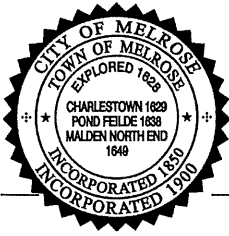
1. **GRANT-2023-1** : Department of Justice Bureau of Justice Assistance STOP School Violence Program Grant

Sponsored by: Health Director Anthony Chui

From: City Council

ASSIGN TO COMMITTEE

V. ADJOURNMENT



CITY OF MELROSE

Office of Treasurer-Collector

Kathryn J Armata
Treasurer-Collector

City Hall, 562 Main Street
Melrose, Massachusetts 02176
Treasurer - (781) 979-4162
Collector - (781) 979-4120
Fax - (781) 665-6877

MEMORANDUM

To: Melrose City Council
Mayor Brodeur

From: Kathryn Armata

Date: September 20, 2022

Re: Loan Order – Horace Mann Elementary School Roof Replacement

ORDERED: That the City appropriates \$1,460,177 for the purpose of paying costs of replacing the roof at the Horace Mann Elementary School located at 30 Damon Avenue, Melrose, Massachusetts, including the payment of all costs incidental and related thereto (the "Project"), which proposed Project would materially extend the useful life of the school and preserve an asset that otherwise is capable of supporting the required educational program, and for which the City may be eligible for a grant from the Massachusetts School Building Authority (the "MSBA"), said amount to be expended under the direction of the Office of Planning and Community Development; that to meet this appropriation, the Treasurer, with the approval of the Mayor, is authorized to borrow said amount under and pursuant to Chapter 44, Section 7(1) or Chapter 70B of the General Laws, or pursuant to any other enabling authority, and to issue bonds or notes of the City therefor; that the City acknowledges that the MSBA's grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and any project costs the City incurs in excess of any grant approved by and received from the MSBA shall be the sole responsibility of the City; that any grant that the City may receive from the MSBA for the Project shall not exceed the lesser of (1) forty-nine and thirty-one hundredths percent (49.31%) of eligible, approved project costs, as determined by the MSBA, or (2) the total maximum grant amount determined by the MSBA; and that the amount of the borrowing authorized by this order shall be reduced by any grant amount set forth in and received pursuant to the Project Funding Agreement that may be executed between the City and the MSBA.

Pursuant to Section 56-14 of the City Ordinances, attached is a projection of the principal and interest costs on the bonds proposed to be authorized by the following loan orders under

Attachment: Order for HM Roof funding authorization (ORDER-2023-27 : Horace Mann School Roof Replacement)

consideration by the City Council. The payment schedule attached assumes a 30-year borrowing term, an interest rate assumption of 5.5% over the life of the borrowing, and a level debt service payment schedule. The debt service on these bonds will not be paid from an enterprise fund and will have no impact on any enterprise fund rates."

FINANCIAL IMPACT: See attached

BOND DEBT SERVICE

City of Melrose, Massachusetts
Proposed \$1,460,177 Horace Mann Elementary School Roof Bonds
30 years - Level Debt Service
Interest Estimated and Subject to Change

	Dated Date Delivery Date		09/15/2023 09/15/2023		
Period Ending	Principal	Coupon	Interest	Debt Service	Annual Debt Service
03/15/2024	-	-	40,154.87	40,154.87	-
06/30/2024	-	-	-	-	40,154.87
09/15/2024	20,177.00	5.500%	40,154.87	60,331.87	-
03/15/2025	-	-	39,600.00	39,600.00	-
06/30/2025	-	-	-	-	99,931.87
09/15/2025	20,000.00	5.500%	39,600.00	59,600.00	-
03/15/2026	-	-	39,050.00	39,050.00	-
06/30/2026	-	-	-	-	98,650.00
09/15/2026	20,000.00	5.500%	39,050.00	59,050.00	-
03/15/2027	-	-	38,500.00	38,500.00	-
06/30/2027	-	-	-	-	97,550.00
09/15/2027	25,000.00	5.500%	38,500.00	63,500.00	-
03/15/2028	-	-	37,812.50	37,812.50	-
06/30/2028	-	-	-	-	101,312.50
09/15/2028	25,000.00	5.500%	37,812.50	62,812.50	-
03/15/2029	-	-	37,125.00	37,125.00	-
06/30/2029	-	-	-	-	99,937.50
09/15/2029	25,000.00	5.500%	37,125.00	62,125.00	-
03/15/2030	-	-	36,437.50	36,437.50	-
06/30/2030	-	-	-	-	98,562.50
09/15/2030	30,000.00	5.500%	36,437.50	66,437.50	-
03/15/2031	-	-	35,612.50	35,612.50	-
06/30/2031	-	-	-	-	102,050.00
09/15/2031	30,000.00	5.500%	35,612.50	65,612.50	-
03/15/2032	-	-	34,787.50	34,787.50	-
06/30/2032	-	-	-	-	100,400.00
09/15/2032	30,000.00	5.500%	34,787.50	64,787.50	-
03/15/2033	-	-	33,962.50	33,962.50	-
06/30/2033	-	-	-	-	98,750.00
09/15/2033	30,000.00	5.500%	33,962.50	63,962.50	-
03/15/2034	-	-	33,137.50	33,137.50	-
06/30/2034	-	-	-	-	97,100.00
09/15/2034	35,000.00	5.500%	33,137.50	68,137.50	-
03/15/2035	-	-	32,175.00	32,175.00	-
06/30/2035	-	-	-	-	100,312.50
09/15/2035	35,000.00	5.500%	32,175.00	67,175.00	-
03/15/2036	-	-	31,212.50	31,212.50	-
06/30/2036	-	-	-	-	98,387.50
09/15/2036	40,000.00	5.500%	31,212.50	71,212.50	-
03/15/2037	-	-	30,112.50	30,112.50	-
06/30/2037	-	-	-	-	101,325.00
09/15/2037	40,000.00	5.500%	30,112.50	70,112.50	-
03/15/2038	-	-	29,012.50	29,012.50	-
06/30/2038	-	-	-	-	99,125.00
09/15/2038	45,000.00	5.500%	29,012.50	74,012.50	-
03/15/2039	-	-	27,775.00	27,775.00	-
06/30/2039	-	-	-	-	101,787.50
09/15/2039	45,000.00	5.500%	27,775.00	72,775.00	-
03/15/2040	-	-	26,537.50	26,537.50	-
06/30/2040	-	-	-	-	99,312.50
09/15/2040	45,000.00	5.500%	26,537.50	71,537.50	-
03/15/2041	-	-	25,300.00	25,300.00	-
06/30/2041	-	-	-	-	96,837.50
09/15/2041	50,000.00	5.500%	25,300.00	75,300.00	-
03/15/2042	-	-	23,925.00	23,925.00	-
06/30/2042	-	-	-	-	99,225.00
09/15/2042	55,000.00	5.500%	23,925.00	78,925.00	-
03/15/2043	-	-	22,412.50	22,412.50	-
06/30/2043	-	-	-	-	101,337.50
09/15/2043	55,000.00	5.500%	22,412.50	77,412.50	-
03/15/2044	-	-	20,900.00	20,900.00	-
06/30/2044	-	-	-	-	98,312.50
09/15/2044	60,000.00	5.500%	20,900.00	80,900.00	-
03/15/2045	-	-	19,250.00	19,250.00	-
06/30/2045	-	-	-	-	100,150.00
09/15/2045	60,000.00	5.500%	19,250.00	79,250.00	-
03/15/2046	-	-	17,600.00	17,600.00	-
06/30/2046	-	-	-	-	96,850.00
09/15/2046	65,000.00	5.500%	17,600.00	82,600.00	-
03/15/2047	-	-	15,812.50	15,812.50	-
06/30/2047	-	-	-	-	98,412.50
09/15/2047	70,000.00	5.500%	15,812.50	85,812.50	-
03/15/2048	-	-	13,887.50	13,887.50	-
06/30/2048	-	-	-	-	99,700.00
09/15/2048	75,000.00	5.500%	13,887.50	88,887.50	-
03/15/2049	-	-	11,825.00	11,825.00	-
06/30/2049	-	-	-	-	100,712.50
09/15/2049	80,000.00	5.500%	11,825.00	91,825.00	-
03/15/2050	-	-	9,625.00	9,625.00	-
06/30/2050	-	-	-	-	101,450.00
09/15/2050	80,000.00	5.500%	9,625.00	89,625.00	-
03/15/2051	-	-	7,425.00	7,425.00	-
06/30/2051	-	-	-	-	97,050.00
09/15/2051	85,000.00	5.500%	7,425.00	92,425.00	-
03/15/2052	-	-	5,087.50	5,087.50	-
06/30/2052	-	-	-	-	97,512.50
09/15/2052	90,000.00	5.500%	5,087.50	95,087.50	-
03/15/2053	-	-	2,612.50	2,612.50	-
06/30/2053	-	-	-	-	97,700.00
09/15/2053	95,000.00	5.500%	2,612.50	97,612.50	-
06/30/2054	-	-	-	-	97,612.50
	1,460,177.00		1,557,334.74	3,017,511.74	3,017,511.74

Attachment: Order for HM Roof funding authorization (ORDER-2023-27 : Horace Mann School Roof Replacement)



Massachusetts School Building Authority

Deborah B. Goldberg
Chairman, State Treasurer

James A. MacDonald
Chief Executive Officer

John K. McCarthy
Executive Director / Deputy CEO

August 31, 2022

The Honorable Paul Brodeur, Mayor
City of Melrose
Melrose City Hall
562 Main Street
Melrose, MA 02176

Re: City of Melrose, Herbert Clark Hoover Elementary School, Horace Mann Elementary School

Dear Mayor Brodeur:

I am pleased to report that the Board of the Massachusetts School Building Authority (the “MSBA”) voted to approve the Proposed Accelerated Repair Project (the “Proposed Project”) in the City of Melrose (the “City”) for a roof replacement project at the Herbert Clark Hoover Elementary School, and a roof replacement project at the Horace Mann Elementary School.

The Board approved an Estimated Maximum Total Facilities Grant for each project as shown in the table below, which does not include any funds for potentially eligible Owner’s or Construction Contingency Expenditures. In the event that the MSBA determines that any Owner’s and/or Construction Contingency Expenditures are eligible for reimbursement, the Maximum Total Facilities Grant for the Herbert Clark Hoover Elementary School and Horace Mann Elementary School Projects may increase to each amount shown below. The final grant amounts will be determined by the MSBA based on a review and audit of all project costs incurred by the City, in accordance with the MSBA’s regulations, policies, and guidelines and the Project Funding Agreement. The final grant amount may be an amount less than the Estimated Maximum Total Facilities Grant.

Project Funding Agreement	Herbert Clark Hoover Elementary School	Horace Mann Elementary School
Estimated Maximum Total Facilities Grant	\$1,021,573	\$624,400
Maximum Total Facilities Grant	\$1,069,127	\$649,456

Pursuant to the terms of the MSBA’s Accelerated Repair Program, the City has 90 days to acquire and certify local approval for an appropriation and all other necessary local votes or approvals showing acceptance of the cost, site, type, scope and timeline for the Herbert Clark

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 August 31, 2022
 Melrose ARP PFA Board Action Letter

Hoover Elementary School and the Horace Mann Elementary School Projects. Upon receipt of the certified votes demonstrating local approval, the MSBA and the City will execute a Project Funding Agreement, which will set forth the terms and conditions pursuant to which the City will receive its grant from the MSBA. Once the Project Funding Agreement has been executed by both parties, the City will be eligible to submit requests for reimbursement for Proposed Project costs to the MSBA.

We will be contacting you soon to discuss these next steps in more detail, but in the meantime, I wanted to share with you the Board's approval of the Herbert Clark Hoover Elementary School and Horace Mann Elementary School Projects in the City of Melrose for a roof replacement project at the Herbert Clark Hoover Elementary School, and a roof replacement project at the Horace Mann Elementary School, and the Board's authorization to execute a Project Funding Agreement for these Proposed Projects.

Sincerely,



John K. McCarthy
 Executive Director

Cc: Legislative Delegation
 Christopher C. Cinella, President, Melrose City Council
 Denise M. Gaffey, Director of Planning and Community Development, City of Melrose
 Jen McAndrew, Chair, Melrose School Committee
 Dr. Julie Kuckenberger, Superintendent, Melrose Public Schools
 Jon Lemieux, Owner's Project Manager, Vertex Companies, Inc.
 Joseph P. Viamari, Jr., Designer, Tighe & Bond, Inc.
 File: 10.2 Letters

Attachment: MSBA ARP Award Letter 8_31_2022 (ORDER-2023-27 : Horace Mann School Roof Replacement)

**EXHIBIT A
PROJECT BUDGET
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

City of Melrose
Herbert Clark Hoover Elementary School

8/24/2022

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Basis of Estimated Total Facilities Grant or Otherwise Ineligible	Basis of Estimated Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
Feasibility Study Agreement				
OPM Feasibility Study	\$7,500	\$0	\$7,500	
A&E Feasibility Study	\$49,100	\$0	\$49,100	
Env. & Site	\$0	\$0	\$0	
Other	\$0	\$0	\$0	
Feasibility Study Agreement Subtotal	\$56,600	\$0	\$56,600	\$27,909
Administration				
Legal Fees	\$0	\$0	\$0	\$0
Owner's Project Manager				
Design Development	\$0	\$0	\$0	
Construction Contract Documents	\$20,434	\$0	\$20,434	
Bidding	\$8,960	\$0	\$8,960	
Construction Contract Administration	\$101,045	\$0	\$101,045	
Closeout	\$12,558	\$0	\$12,558	
Extra Services	\$0	\$0	\$0	
Reimbursable & Other Services	\$5,000	\$0	\$5,000	
Cost Estimates	\$0	\$0	\$0	
Advertising	\$0	\$0	\$0	
Permitting	\$0	\$0	\$0	
Owner's Insurance	\$0	\$0	\$0	
Other Administrative Costs	\$0	\$0	\$0	
Administration Subtotal	\$147,997	\$0	\$147,997	\$72,977
Architecture and Engineering				
Basic Services				
Design Development	\$0	\$0	\$0	
Construction Contract Documents	\$60,400	\$0	\$60,400	
Bidding	\$4,400	\$0	\$4,400	
Construction Contract Administration	\$34,600	\$0	\$34,600	
Closeout	\$3,600	\$0	\$3,600	
Other Basic Services	\$0	\$0	\$0	
Basic Services Subtotal	\$103,000	\$0	\$103,000	
Reimbursable Services				
Construction testing	\$0	\$0	\$0	
Printing (over minimum)	\$0	\$0	\$0	
Other Reimbursable Costs	\$0	\$0	\$0	
Hazardous Materials	\$10,700	\$0	\$10,700	
Geotech & Geo-Env.	\$0	\$0	\$0	
Site Survey	\$0	\$0	\$0	
Wetlands	\$0	\$0	\$0	
Traffic Studies	\$0	\$0	\$0	
Architectural/Engineering Subtotal	\$113,700	\$0	\$113,700	\$56,065
CM & Risk Preconstruction Services				
Pre-Construction Services	\$0	\$0	\$0	\$0
Site Acquisition				
Land/Building Purchase	\$0	\$0	\$0	
Appraisal Fees	\$0	\$0	\$0	
Recording fees	\$0	\$0	\$0	
Site Acquisition Subtotal	\$0	\$0	\$0	\$0
Construction Costs				
Construction Budget	\$0	\$0		
GMP Fee	\$0	\$0		
GMP Insurance	\$0	\$0		
GMP Contingency	\$0	\$0		
Division 1 - General Requirements	\$543,866	\$0		
Division 2 - Existing Conditions	\$340,900	\$0		
Division 3 - Concrete	\$0	\$0		
Division 4 - Masonry	\$16,200	\$0		
Division 5 - Metals	\$157,086	\$0		
Division 6 - Woods, Plastics and Composites	\$28,464	\$0		
Division 7 - Thermal and Moisture Protection	\$654,165	\$127,577		
Division 8 - Openings	\$0	\$0		
Division 9 - Finishes	\$0	\$0		
Division 10 - Specialties	\$0	\$0		
Division 11 - Equipment	\$0	\$0		
Division 12 - Furnishings	\$0	\$0		
Division 13 - Special Construction	\$0	\$0		
Division 14 - Conveying Systems	\$0	\$0		
Division 21 - Fire Suppression	\$0	\$0		
Division 22 - Plumbing	\$32,685	\$0		
Division 23 - HVAC	\$63,526	\$0		
Division 25 - Integrated Automation	\$0	\$0		
Division 26 - Electrical	\$44,124	\$0		
Division 27 - Communications	\$0	\$0		
Division 28 - Electronic Safety and Security	\$0	\$0		
Division 31 - Earthwork	\$0	\$0		
Division 32 - Exterior Improvements	\$0	\$0		
Division 33 - Utilities	\$0	\$0		
Construction Budget	\$1,881,016	\$127,577	\$1,753,439	\$864,621
Alternates				
	\$0	\$0	\$0	
	\$0	\$0	\$0	
	\$0	\$0	\$0	
Alternates Subtotal	\$0	\$0	\$0	\$0
Miscellaneous Project Costs				
Utility company Fees	\$0	\$0	\$0	
Testing Services	\$0	\$0	\$0	
Swing Space/Modulars	\$0	\$0	\$0	
Other Project Costs (Mailing & Moving)	\$0	\$0	\$0	
Misc. Project Costs Subtotal	\$0	\$0	\$0	\$0

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

City of Melrose
Herbert Clark Hoover Elementary School

8/24/2022

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Basis of Estimated Total Facilities Grant or Otherwise Ineligible	Basis of Estimated Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
<i>Furnishings and Equipment</i>				
<i>Furnishings</i>	\$0	\$0	\$0	
<i>Equipment</i>	\$0	\$0	\$0	
<i>Computer Equipment</i>	\$0	\$0	\$0	
FF&E Subtotal	\$0	\$0	\$0	\$0
Soft Costs that exceed 20% of Const'n Cost		\$0	\$0	
Project Budget	\$2,199,313	\$127,577	\$2,071,736	\$1,021,573

Board Authorization	
Project Budget	\$2,199,313
Scope Items Excluded or Otherwise Ineligible	-\$127,577
Basis of Estimated Total Facilities Grant ¹	\$2,071,736
Reimbursement Rate	49.31%
Estimated Maximum Total Facilities Grant ¹	\$1,021,573

Total Construction Contingency ²	\$94,051
Ineligible Construction Contingency ²	\$6,379
Potentially Eligible Construction Contingency ²	\$87,672
Total Owner's Contingency ²	\$13,085
Ineligible Owner's Contingency ²	\$4,318
Potentially Eligible Owner's Contingency ²	\$8,767
Total Potentially Eligible Contingency ²	\$96,439
Reimbursement Rate	49.31%
Potential Additional Contingency Grant Funds ²	\$47,554
Maximum Total Facilities Grant	\$1,069,127
Total Project Budget	\$2,306,449

This document was prepared by the MSBA based on a preliminary review of information and estimates provided by the Owner's Project Manager of City of Melrose for the Herbert Clark Hoover Elementary School project. Based on this preliminary review, certain budget, cost and scope items have been determined to be ineligible for reimbursement, however, this document does not contain a final, exhaustive list of all budget, cost and scope items which may be ineligible for reimbursement by the MSBA. Nor is it intended to be a final determination of which budget, cost and scope items may be eligible for reimbursement by the MSBA. All project budget, cost and scope items shall be subject to review and audit by the Authority, and the Authority shall determine, in its sole discretion whether any such budget, cost and scope items are eligible for reimbursement. The MSBA may determine that certain additional budget, cost and scope items are ineligible for reimbursement.

1. The estimated maximum facilities grant established for the Project Funding Agreement does not include any potentially eligible contingency funds and is subject to review and audit by the MSBA. At the time of PFA Bid Amendment, the Estimated Maximum Facilities Grant and the Maximum Total Facilities Grant will be adjusted to account for any budget revision requests submitted and approved by the MSBA at the time of establishing the Amendment.

2. Pursuant to Section 3.20 of the Project Funding Agreement and the applicable policies and guidelines of the Authority, any project costs associated with the reallocation or transfer of funds from either the Owner's contingency or the Construction contingency to other budget line items shall be subject to review by the Authority to determine whether any such costs are eligible for reimbursement by the Authority. All costs are subject to review and audit by the MSBA.

By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By:
Title: Chair of School Building Committee

Date: _____

By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By:
Title: Superintendent of Schools

Date: _____

By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By:
Title: Chief Executive Officer

Date: _____

By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By:
Title: Chair of School Committee

Date: _____

City of Melrose
Horace Mann Elementary School

8/24/2022

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Basis of Estimated Total Facilities Grant or Otherwise Ineligible	Basis of Estimated Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
Feasibility Study Agreement				
OPM Feasibility Study	\$7,500	\$0	\$7,500	
A&E Feasibility Study	\$40,700	\$0	\$40,700	
Env. & Site	\$0	\$0	\$0	
Other	\$0	\$0	\$0	
Feasibility Study Agreement Subtotal	\$48,200	\$0	\$48,200	\$23,767
Administration				
Legal Fees	\$0	\$0	\$0	\$0
Owner's Project Manager				
Design Development	\$0	\$0	\$0	
Construction Contract Documents	\$20,434	\$0	\$20,434	
Bidding	\$8,960	\$0	\$8,960	
Construction Contract Administration	\$101,045	\$0	\$101,045	
Closeout	\$12,558	\$0	\$12,558	
Extra Services	\$0	\$0	\$0	
Reimbursable & Other Services	\$5,000	\$0	\$5,000	
Cost Estimates	\$0	\$0	\$0	
Advertising	\$0	\$0	\$0	
Permitting	\$0	\$0	\$0	
Owner's Insurance	\$0	\$0	\$0	
Other Administrative Costs	\$0	\$0	\$0	
Administration Subtotal	\$147,997	\$0	\$147,997	\$72,977
Architecture and Engineering				
Basic Services				
Design Development	\$0	\$0	\$0	
Construction Contract Documents	\$41,400	\$0	\$41,400	
Bidding	\$4,400	\$0	\$4,400	
Construction Contract Administration	\$28,800	\$0	\$28,800	
Closeout	\$3,600	\$0	\$3,600	
Other Basic Services	\$0	\$0	\$0	
Basic Services Subtotal	\$78,200	\$0	\$78,200	
Reimbursable Services				
Construction testing	\$0	\$0	\$0	
Printing (over minimum)	\$0	\$0	\$0	
Other Reimbursable Costs	\$0	\$0	\$0	
Hazardous Materials	\$5,400	\$0	\$5,400	
Geotech & Geo-Env.	\$0	\$0	\$0	
Site Survey	\$0	\$0	\$0	
Wetlands	\$0	\$0	\$0	
Traffic Studies	\$0	\$0	\$0	
Architectural/Engineering Subtotal	\$83,600	\$0	\$83,600	\$41,223
CM & Risk Preconstruction Services				
Pre-Construction Services	\$0	\$0	\$0	\$0
Site Acquisition				
Land/Building Purchase	\$0	\$0	\$0	
Appraisal Fees	\$0	\$0	\$0	
Recording fees	\$0	\$0	\$0	
Site Acquisition Subtotal	\$0	\$0	\$0	\$0
Construction Costs				
Construction Budget	\$0	\$0		
GMP Fee	\$0	\$0		
GMP Insurance	\$0	\$0		
GMP Contingency	\$0	\$0		
Division 1 - General Requirements	\$321,849	\$0		
Division 2 - Existing Conditions	\$212,272	\$0		
Division 3 - Concrete	\$0	\$0		
Division 4 - Masonry	\$0	\$0		
Division 5 - Metals	\$5,380	\$0		
Division 6 - Woods, Plastics and Composites	\$16,656	\$0		
Division 7 - Thermal and Moisture Protection	\$475,936	\$96,869		
Division 8 - Openings	\$0	\$0		
Division 9 - Finishes	\$0	\$0		
Division 10 - Specialties	\$0	\$0		
Division 11 - Equipment	\$0	\$0		
Division 12 - Furnishings	\$0	\$0		
Division 13 - Special Construction	\$0	\$0		
Division 14 - Conveying Systems	\$0	\$0		
Division 21 - Fire Suppression	\$0	\$0		
Division 22 - Plumbing	\$29,864	\$0		
Division 23 - HVAC	\$25,226	\$0		
Division 25 - Integrated Automation	\$0	\$0		
Division 26 - Electrical	\$25,960	\$0		
Division 27 - Communications	\$0	\$0		
Division 28 - Electronic Safety and Security	\$0	\$0		
Division 31 - Earthwork	\$0	\$0		
Division 32 - Exterior Improvements	\$0	\$0		
Division 33 - Utilities	\$0	\$0		
Construction Budget	\$1,113,143	\$96,869	\$1,016,274	\$501,125
Alternates				
	\$0	\$0	\$0	
	\$0	\$0	\$0	
	\$0	\$0	\$0	
Alternates Subtotal	\$0	\$0	\$0	\$0
Miscellaneous Project Costs				
Utility company Fees	\$0	\$0	\$0	
Testing Services	\$0	\$0	\$0	
Swing Space/Modulars	\$0	\$0	\$0	
Other Project Costs (Mailing & Moving)	\$0	\$0	\$0	
Misc. Project Costs Subtotal	\$0	\$0	\$0	\$0

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

City of Melrose
Horace Mann Elementary School

8/24/2022

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Basis of Estimated Total Facilities Grant or Otherwise Ineligible	Basis of Estimated Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
<i>Furnishings and Equipment</i>				
<i>Furnishings</i>	\$0	\$0	\$0	
<i>Equipment</i>	\$0	\$0	\$0	
<i>Computer Equipment</i>	\$0	\$0	\$0	
FF&E Subtotal	\$0	\$0	\$0	\$0
Soft Costs that exceed 20% of Const'n Cost		\$29,797	-\$29,797	
Project Budget	\$1,392,940	\$126,666	\$1,266,274	\$624,400

Board Authorization	
Project Budget	\$1,392,940
Scope Items Excluded or Otherwise Ineligible	-\$126,666
Basis of Estimated Total Facilities Grant ¹	\$1,266,274
Reimbursement Rate	49.31%
Estimated Maximum Total Facilities Grant ¹	\$624,400

Total Construction Contingency ²	\$55,657
Ineligible Construction Contingency ²	\$4,843
Potentially Eligible Construction Contingency ²	\$50,814
Total Owner's Contingency ²	\$11,580
Ineligible Owner's Contingency ²	\$11,580
Potentially Eligible Owner's Contingency ²	\$0
Total Potentially Eligible Contingency ²	\$50,814
Reimbursement Rate	49.31%
Potential Additional Contingency Grant Funds ²	\$25,056
Maximum Total Facilities Grant	\$649,456
Total Project Budget	\$1,460,177

This document was prepared by the MSBA based on a preliminary review of information and estimates provided by the Owner's Project Manager of City of Melrose for the Horace Mann Elementary School project. Based on this preliminary review, certain budget, cost and scope items have been determined to be ineligible for reimbursement, however, this document does not contain a final, exhaustive list of all budget, cost and scope items which may be ineligible for reimbursement by the MSBA. Nor is it intended to be a final determination of which budget, cost and scope items may be eligible for reimbursement by the MSBA. All project budget, cost and scope items shall be subject to review and audit by the Authority, and the Authority shall determine, in its sole discretion whether any such budget, cost and scope items are eligible for reimbursement. The MSBA may determine that certain additional budget, cost and scope items are ineligible for reimbursement.

1. The estimated maximum facilities grant established for the Project Funding Agreement does not include any potentially eligible contingency funds and is subject to review and audit by the MSBA. At the time of PFA Bid Amendment, the Estimated Maximum Facilities Grant and the Maximum Total Facilities Grant will be adjusted to account for any budget revision requests submitted and approved by the MSBA at the time of establishing the Amendment.

2. Pursuant to Section 3.20 of the Project Funding Agreement and the applicable policies and guidelines of the Authority, any project costs associated with the reallocation or transfer of funds from either the Owner's contingency or the Construction contingency to other budget line items shall be subject to review by the Authority to determine whether any such costs are eligible for reimbursement by the Authority. All costs are subject to review and audit by the MSBA.

By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By: _____
Title: Chair of School Building Committee

Date: _____

By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By: _____
Title: Superintendent of Schools

Date: _____

By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By: _____
Title: Chief Executive Officer

Date: _____

By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By: _____
Title: Chair of School Committee

Date: _____

**EXHIBIT B
PROJECT SCOPE
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

Schematic Design Submission Checklist MSBA Accelerated Repair Program



District: Melrose Public Schools

School: Herbert Clark Hoover Elementary School

Scope: Roof Replacement

Schematic Design Deliverables:

OPM	District	
☒	☒	Project Narrative: - Existing conditions analysis (hazardous materials, structural, etc.) - Explanation of proposed solution - Designer statement that the proposed solution meets the Massachusetts Stretch Energy Code and/or the International Energy Conservation Code
☒	☒	Code Analysis
☒	☒	Schematic Design Drawings
☒	☒	Cost Estimate (CSI Format) - Include all Proposed Alternates
☒	☒	Form 3011 – Total Project Budget
☒	☒	Project Cash Flow (cumulative line chart illustrating Total Project Budget)
☒	☒	Project Schedule (Gantt Chart)
☒	☒	Accelerated Repair Program Reimbursement Rate Certification signed by the District
☒	☒	Proposed project scope and budget vote language in compliance with MSBA standard vote language

Schematic Design Submission Checklist MSBA Accelerated Repair Program



Program Guidelines and Project Funding Agreement:

OPM	District	
☒	☒	MSBA Board of Directors authorization to execute a Project Funding Agreement is tied to the specific project scope and budget presented in the Schematic Design.
☒	☒	The portion of the Construction Contingency potentially eligible for reimbursement is set at 5% of the total estimated eligible construction costs as included in the PFA's Total Project Budget and is intended for hard costs only. The MSBA will complete one Change Order review per district in which the MSBA will review Change Orders for eligibility not validity. All ineligible costs will not be reimbursed.
☒	☒	The portion of the Owner's Contingency potentially eligible for reimbursement is set at 0.5% of the total estimated eligible construction costs as included in the PFA's Total Project Budget and is intended for soft costs only. All ineligible costs will not be reimbursed.
☒	☒	Prior to securing project funding, the district will draft proposed project scope and budget vote language in compliance with MSBA standard vote language and will provide the vote language to the MSBA for review and approval prior to taking the vote.
☒	☒	After bids have been received and actual construction costs are established, the district's potential Project Funding Agreement must be revised to reflect the actual construction costs in accordance with paragraph 2.3 of the Project Funding Agreement. If there are bid savings, the MSBA shares in the cost savings by reducing the maximum facilities grant to reflect reimbursable costs. If there is a bid overage, construction contingency is transferred to the construction budget to reflect the additional costs and is deemed ineligible. The transfer of construction contingency due to the bid overage results in a reduction to the maximum facilities grant.
☒	☒	MSBA's standardized Schedule of Values will be used by the district to ensure that all budget entries in the MSBA's ProPay system mirror the Total Project Budget Form 3011 following the PFA Bid Amendment. The MSBA will only reimburse eligible costs if they are entered to the correct cost codes in the Total Project Budget.
☒	☒	Budget Revision Requests will be submitted by the district in a timely manner to reflect changes to the Total Project Budget. After a Budget Revision Request is executed, the district will enter the Budget Revision Request into the ProPay system for approval by the MSBA.

Schematic Design Submission Checklist MSBA Accelerated Repair Program



☒	☒	MSBA's Audit Department will review requests for reimbursement in the ProPay system of \$50,000 or more. All reimbursement requests which are less than \$50,000 will be returned to the district without review. All districts are encouraged to attend ProPay training conducted by the Audit Department following the execution of a Project Funding Agreement.
☒	☒	OPM monthly reporting begins when the OPM contract is executed and continues until the project receives Board of Directors approval of the final audit. Failure to submit timely and complete reports may impact district reimbursement review and payment. OPM monthly reporting supports MSBA review of reimbursement requests.

I certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that I have fulfilled all requirements described in Section 8.2 of the MSBA Standard Contract for Project Management Services (Accelerated Repair Program) by submitting the listed deliverables by the established deadline to the MSBA. I further certify, as evidenced by the boxes set forth under the heading, "Program Guidelines and Project Funding Agreement," which I have checked above, that I have explained the Program Guidelines and Project Funding Agreement to the district.

I understand that if a conflict is created between this form and the Project Funding Agreement, the Project Funding Agreement is the controlling document. I also understand that if a conflict is created between this form and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program), the MSBA Standard Contract is the controlling document. I further recognize that the purpose of this form is to further understand the Project Funding Agreement and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program).

Title: Project Director, Owner's Project Manager
Firm: The Vertex Companies, LLC
Date: June 27, 2022

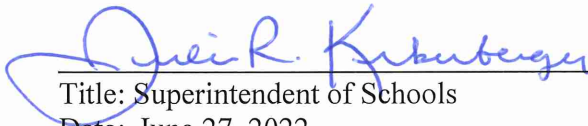
I certify, as evidenced by the boxes set forth under the heading, "Program Guidelines and Project Funding Agreement," which I have checked above, that I have read and understand the Program Guidelines and Project Funding Agreement. I certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that I have reviewed the enumerated deliverables within the Schematic Design Submittal with the Owner's Project Manager and Designer. I further

Schematic Design Submission Checklist MSBA Accelerated Repair Program



certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that the OPM has explained to me the OPM's responsibilities as described in Section 8.2 of the MSBA Standard Contract for Project Management Services (Accelerated Repair Program) to submit the designer's deliverables listed above.

I understand that if a conflict is created between this form and the Project Funding Agreement, the Project Funding Agreement is the controlling document. I also understand that if a conflict is created between this form and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program), the MSBA Standard Contract is the controlling document. I further recognize that the purpose of this form is to further understand the Project Funding Agreement and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program).


Title: Superintendent of Schools
Date: June 27, 2022

Section 1

Project Narrative

1.1 Introduction

The City of Melrose is currently participating in the Massachusetts School Building Authority (MSBA) Accelerated Repair Program (ARP) and has submitted a Statement of Interest for repairs at the Herbert Clark Hoover School. The Vertex Companies, LLC and Tighe & Bond, Inc. were subsequently designated as the Owner's Project Manager (OPM) and Designer, respectively for the proposed project.

The Herbert Clark Hoover School is located at 37 Glendower Road in Melrose, MA. The school building is a two-story brick masonry building with an approximate roof area of 18,000 square feet, which was constructed in 1964. The school has undergone several renovations over time, including a window and door replacement in 2015 and a prefabricated, wood-framed modular building addition in 2017. The first floor of the school generally consists of classrooms, storage rooms, a multipurpose room, a teacher's lounge, administrative and nurse offices, a library, bathrooms, and a boiler room. The second floor contains classrooms and bathrooms. The school currently serves approximately 300 students from kindergarten to fifth grade.

The team assembled for execution of the Herbert Clark Hoover School project includes the following members:

- | | |
|----------------------------------|---|
| • Funding Agency | Massachusetts School Building Authority |
| • Owner | Melrose Public Schools |
| • OPM | The Vertex Companies, LLC |
| • Designer | Tighe & Bond Designer Services, Inc. |
| • Cost Estimating | Ellana Construction Consultants. |
| • Hazardous Materials Assessment | Tighe & Bond Designer Services, Inc. |
| • Code Review | Tighe & Bond Designer Services, Inc. |
| • Structural/Construction Admin | Frawley Engineering, P.C. |

1.2 Existing Conditions

1.2.1 Roof

The existing Ethylene Propylene Diene Monomer (EPDM) roof system was constructed over an original coal tar pitch and gravel built up roof. Based on documents provided by the District, the original roof on the 1964 area consisted of 5 ply built-up coal tar pitch and gravel over 1.5" rigid insulation on a steel deck. Based on recent site visits and field investigation, ½" fiberboard and EPDM membrane were installed over the original roof system. The largest portion of the roof area is ballasted with gravel, while several smaller sections are fully adhered.

There is significant evidence of water damage inside the building from roof leaks and numerous deficiencies in the roofing membrane. The roof does not provide adequate thermal performance and drainage. Based on the site observations and investigation, the existing roofing system and majority of associated appurtenances appear to be in poor condition and are beyond their useful life.



Photo 1: Roof Over Main Building



Photo 2: Roof Over Lower Building

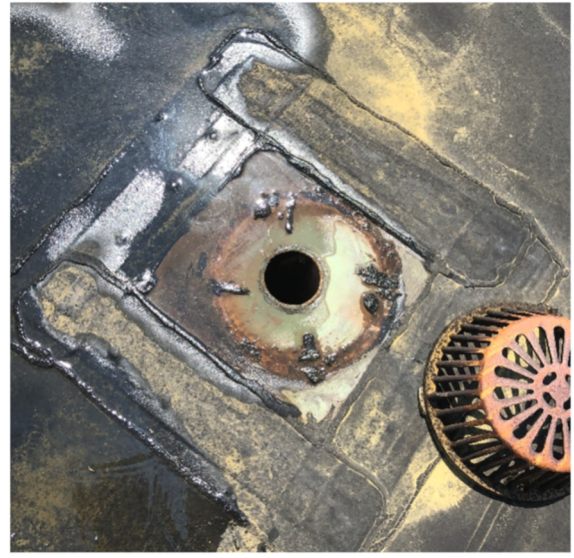
The modular addition constructed in 2017 consists of a single ply membrane roofing system and is not included as part of this project.

1.2.2 Plumbing

There are existing roof drains that are tied into the storm drainage system in the building. The drains appear to be in working order, however some are rusted and in poor condition.

One storm leader exits the building and runs above a sub-roof near the main entrance toward a vertical storm leader tied into the underground storm drainage system.

Plumbing vents penetrate the roof in multiple locations to provide pressure relief for the school's sanitary piping system. The vent piping is in good condition with expected rust on the pipe interior.

**Photo 3:** Roof Drain**Photo 4:** Roof Drain**Photo 5:** Storm Leader Routed on Roof**1.2.3 HVAC**

There are seven exhaust fans (EFs) installed on the main building's roof and rooftop air handling units are located on the temporary addition, which is not part of this project.

Most of the exhaust fans appear original and are well beyond the 15-25-year life expectancy. One exhaust fan, identified as “#6” on the 1964 drawings, has been replaced and appears that it can be re-used.



Photo 6: HVAC Equipment on Main Roof

1.2.4 Electrical

The existing electrical items on the roof are limited to electrical connections to HVAC equipment requiring electrical power. It is assumed that each HVAC fan has an integral or equipment-mounted disconnect. In addition, loose telecommunication cables run across the roof from the north wall to an entrance cap near the roof hatch.

1.3 Recommended Solutions

1.3.1 Roof Replacement

Replacement of the existing roof system at the Herbert Clark Hoover School is recommended for improving thermal performance, roof drainage, overall energy efficiency of the building and remedying numerous roof leaks. The following items below outline the proposed scope of work for the project, including demolition. Schematic Design plans with additional detail are included in Appendix B.

Roof Demolition will include:

- Removal of the existing single-ply, adhered and ballasted EPDM membrane roofing systems
- Removal of existing built-up coal tar pitch and gravel roof system
- Removal of the existing rigid insulation
- Removal of the existing access hatch
- Repair of the steel roof deck as needed
- Removal and storage of existing HVAC equipment
- Removal of existing fascia, blocking, damaged curbing, and flashing

- Disposal of existing roofing materials as asbestos waste.

Proposed Roof Improvements will include:

- Repair of any damaged or compromised steel roof decking discovered during demolition
- Installation of a fully-adhered EPDM roofing system. The new roofing system will include, from bottom to top:
 - Fiberglass-reinforced gypsum sheathing cover board
 - Base sheet/ combination air and vapor barrier
 - New polyisocyanurate rigid insulation. The new insulation will meet the stretch energy code. Insulation thickness will provide a minimum R-value of 30. Tapered insulation will be installed to provide a positive pitch toward roof drains.
 - ½" coverboard installed over the insulation
 - Fully-adhered EPDM roofing membrane
- Installation of new curbing, blocking, flashing, metal fascia, and roof drains
- Installation of new access hatches and ladders

1.3.2 Plumbing Systems

Plumbing Demolition will include:

- Removal of all existing roof drains. Existing rain leaders within building will be cut and capped away from the drain body and prepared for reconnection.
- Removal of storm drain leader and it's supports located on the roof. Piping will be cut and capped at the edge of the roof and prepared for reconnection into the vertical storm leader.

Proposed Plumbing Improvements will include:

- Installation of new roof drains and associated piping. All new roof drains will be of the same type.
- Installation of 1" thick insulation on drain bodies and any new associated piping.
- Inspection of existing drainage piping, including snaking the pipes to check for clogs and jetting the pipes should there be any clogs present.
- Installation and rerouting of the new storm leader on the roof to the underground connection. New piping will be provided with supports.
- Extension of vent piping as required to maintain clearance above roof of 18-24".

1.3.3 HVAC Systems

HVAC Demolition will include:

- Disconnection, removal, and storage of roof fan #6.
- Curb for fan #6 to remain.
- Removal, and disposal of all other roof exhaust fans and curbs.
- Prior to unit removal, exhaust fans will be tested and airflows recorded for final balancing efforts.
- Installation of temporary caps for all ductwork.
- Installation of temporary caps over fan #6 curb that is to remain.

HVAC Improvements will include:

- Replacement off all roof exhaust fans, except #6. Replace fans in kind based on original design drawing schedules.
- Installing new curbs for new exhaust fans, including transition curbs as required for fan connection to existing roof opening.
- Repairing curbs and/or blocking and extending existing curb as required to minimum of 12" above new roof for remaining fan.
- Installation of new Exhaust Fans with integral disconnects.
- Reinstallation of retained Exhaust Fan.
- Reconnecting and sealing units to existing ductwork.
- Connecting units to existing controls.
- Re-balancing systems to match pre-existing airflows.

1.3.4 Electrical Systems

The proposed electrical work will include:

- Disconnecting and making safe all existing electrical devices with connections to mechanical equipment. Once the existing equipment is placed back in its permanent location after roofing, the electrical connections will be re-energized. For any equipment that has moved, the existing conduit and wires will be extended as required.
- Installation of exterior weatherproof GFI receptacles and weatherproof luminaire will be located on the roof within 25'-0" of any exterior equipment per NEC. New receptacles and luminaire will be mounted to ¾" rigid galvanized steel or to an adjacent wall if possible.
- Removal and reconnection of telecommunication cable. Upon reconnection cables will be secured and rerouted for safety.

1.4 ARP Sustainability Requirements

MSBA's ARP requires use of the Stretch Energy Code (780 CMR – Appendix AA and 2018 IECC) as the basis of design for ARP projects for roof replacement. Below is a table comparison of the required code values for the relevant project items and the values for the proposed assemblies. The proposed solutions and items for the Herbert Clark Hoover School meet or exceed the ARP sustainability requirements.

Roofs	Maximum U-Value (Btu/hr·ft ² ·°F)	Minimum R-Value (°F·ft ² ·hr/Btu)
Required	0.032	30
Proposed	0.032	30

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Herbert Clark Hoover School Repairs Project

Building Code Analysis

This analysis summarizes codes requirements applicable to the project scope for the Herbert Clark Hoover School Repairs Project. This summary includes general code information applicable to the overall project and more specific requirements related to roof replacement activities.

Applicable codes for this project include:

- International Building Code 2015 (IBC)
- International Existing Building Code 2015 (IEBC)
- International Energy Conservation Code 2018 (IECC)
- 248 CMR 10.00 Uniform State Plumbing Code (2017)
- Commonwealth of Massachusetts State Building Code, Ninth edition 780 CMR (including amendments to the IBC, IECC and IEBC)
- Massachusetts Stretch Energy Code 780 Appendix AA
- Architectural Access Board Regulations 521 CMR (AAB)
- American Society of Civil Engineers – Minimum Design Loads for Buildings and Other Structures (ASCE 7-05)
- National Electrical Code NFPA 70

Section 1 – General Code

Use and Occupancy Classification (305 IBC 2015 & 780 CMR)

- Educational (E)
 - Due to the anticipated scope of work, roof replacement, Level 1 alterations of the IEBC will be triggered. Level 1 alterations encompass the removal and replacement of materials that serve the same purpose. Any new elements must comply with the requirements for new construction.

Types of Construction (602 IBC 2015 & 780 CMR)

- Type III Construction – Construction is that type of construction in which the exterior walls are of noncombustible materials and the interior building elements are of any material permitted by this code. Fire-retardant-treated wood framing complying with Section 2303.2 shall be permitted within exterior wall assemblies of a 2-hour rating or less.

Alterations Level 1 (503 IEBC 2015 & 780 CMR)

- Removal and replacement or the covering of existing materials, elements, or fixtures using new materials, elements, equipment, or fixtures that serve the same purpose.

Material and Methods (702.6 & Chapter 8 IEBC 2015 & 780 CMR)

- All new work shall comply with materials and methods requirements in the IBC, IEBC, IECC, IMC, and MSPC, as applicable that specify material standards, details of installation and connection, joints, penetrations, and continuity of any element, component, or system in the building.

Section 2 – Requirements Applicable to Roof Replacement Work**Building Envelope Requirements (IECC 2015, Table C402.3)**

- Roof Maximum U-Factors
 - Insulation entirely above deck – U-0.032
- Roof Minimum R-Values
 - Insulation entirely above deck – R-30

Massachusetts State Building Code (780 CMR Amendments)

- Dead loads on an existing roof may not increase by more than 5% due to a re-roofing project.
- If the additional dead loads exceed 5%, the structure must conform to current snow load requirements.
- Since a similar EPDM roofing system (and ballast in some locations) is being removed from the roof prior to roof replacement, the new roof system is not anticipated to increase the dead load on the roof by more than 5%.

Code of Federal Regulations Title 29 (29 CFR)

- Holes – each employee on walking/working surfaces shall be protected from falling through holes more than 6 feet above lower levels, by personal fall-arrest systems, covers, or guardrail systems erected around such holes.

Snow Drift Implications of Added Insulation (IECC 2015)

- 2015 IBC Code section 1608 pertains to current snow load requirements and requires use of ASCE 7. Increasing the insulation thickness on an existing roof requires the roof meet current Code requirements. The snow load requirements have snow drift loading requirements that, when calculated for the Herbert Clark Hoover School result in a potential area of overload extending 15 feet from the high wall sections of the roof.
- IECC Section C501.2 notes that this code shall not prevent the continued use and maintenance of an existing building lawfully in existence at the time of adoption of the code. Section C501.5 permits utilization of like materials for repairs, provided that hazards to life, health, or property are not created.
- IECC Section C503.1 states, Alterations shall not overload existing building systems and an exception to IECC requirements is provided for roof recovering projects. To prevent overloading of the existing building, existing insulation thickness will be maintained a distance of 15 feet from the high roof areas.

Uniform State Plumbing Code 248 CMR 10.00

- Storm Drain leaders are sized based on roof area served. The roof is broken up into six areas, which are served by 2", 3" and 4" roof drains. These roof drain can respectively capture storm water from 720sqft, 2200sqft and 4600sqft of roof area per 248 CMR 10.0. The roof drain sizes installed suffice for the school's roof. The new roof drains will use the same outlet size as the existing ones.

Section 4 – Accessibility Requirements

Existing Building (3.3 MAAB 521 CMR)

- Requirements for an accessible entry, toilet, drinking fountain, and telephone (if pay phones are provided) will be triggered based on the estimated cost of the project. A proponent is required to provide these items if the cost of a renovation project exceeds \$500,000.
- If the work costs less than \$100,000, then only the work being performed is required to comply with 521 CMR.
- Exception: Whether performed alone or in combination with each other, the following types of alterations are not subject to 521 CMR 3.3.1, unless the cost of work exceeds \$500,000 or unless work is being performed on the entrance or toilet room.
 - Curb cuts
 - Alteration work which is limited solely to electrical mechanical, or plumbing systems; to abatement of hazardous materials; or retrofit of automatic sprinklers and does not involve the alteration of any elements or spaces required to be accessible under 521 CMR. Where electrical outlets and controls are altered, they must comply with 521 CMR
 - Roof repair or replacement, window repair or replacement, repointing and masonry repair work
 - Work related to septic system repairs, site utilities and landscaping.
- If the cost of the project, and any additional renovations completed within 36 months of the project, exceeds 30% +of the full and fair cash value of the building, the entire building must be upgraded as required to meet 521 CMR requirements.
- The building currently complies with ADA/AAB requirements and accessibility upgrades will not be required as part of this project.

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HOOVER ELEMENTARY SCHOOL

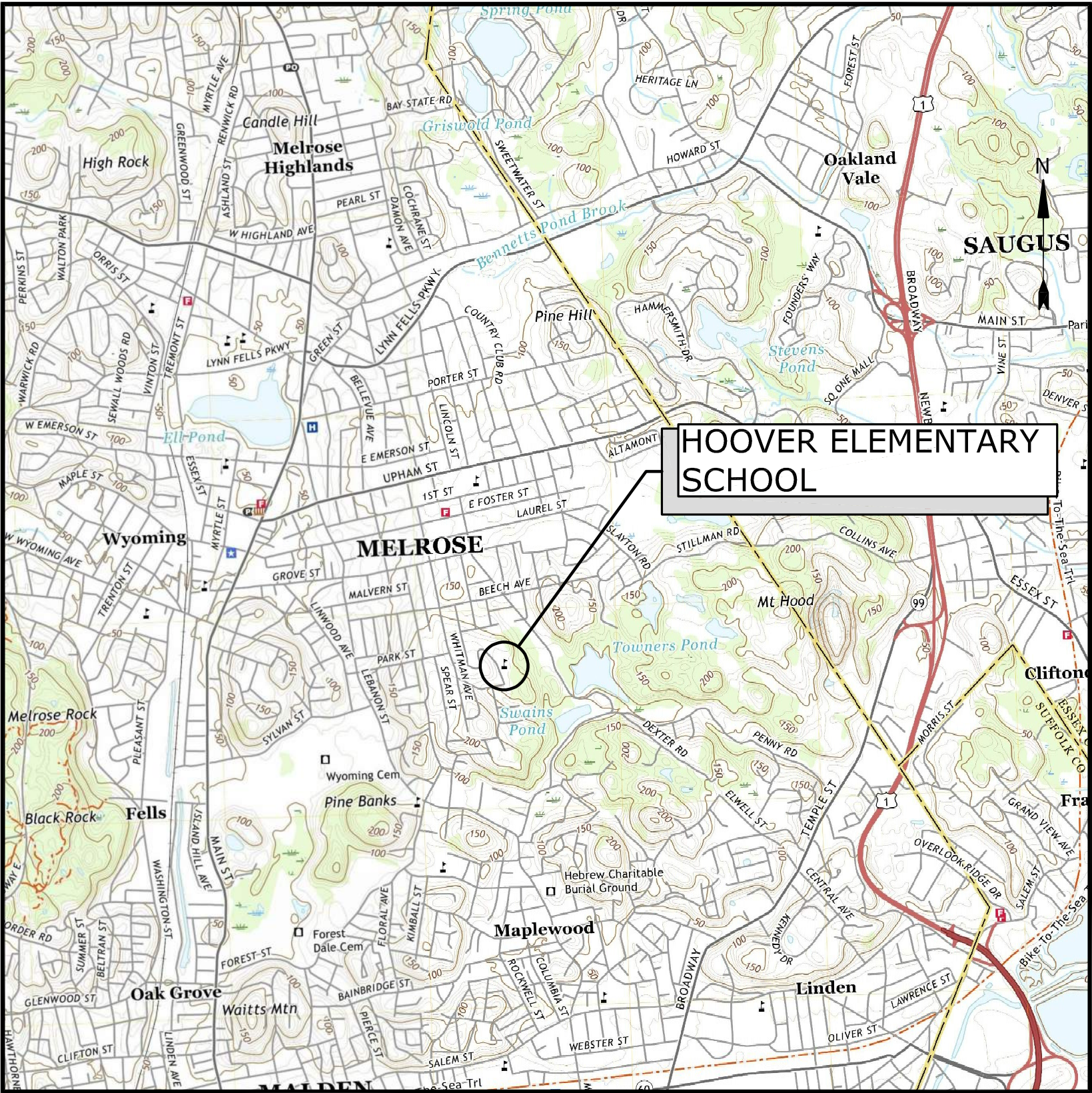
MSBA ACCELERATED REPAIR PROGRAM

ROOF REPLACEMENT PROJECT

MELROSE, MASSACHUSETTS

JUNE 2022

LIST OF DRAWINGS	
	COVER
G-001	ROOF PHOTOGRAPHS
AD-101	ROOF DEMOLITION PLAN
A-101	ROOF REPLACEMENT PLAN
A-501	ROOF DETAILS - 1
A-502	ROOF DETAILS - 2
P-101	PLUMBING ROOF PLAN
H-101	HVAC ROOF PLAN
E-101	ELECTRICAL ROOF PLAN



LOCATION MAP
SCALE: 1" = 2000'

PROJECT TEAM:

OWNER
CITY OF MELROSE
562 MAIN STREET
MELROSE, MA 02176

OWNER'S PROJECT MANAGER
THE VERTEX COMPANIES, INC.
400 LIBBEY PARKWAY
WEYMOUTH, MA 02189

COST ESTIMATING
ELLANA, INC.
98 NORTH WASHINGTON STREET
SUITE 109
BOSTON, MA 02114

FUNDING
MASSACHUSETTS SCHOOL
BUILDING AUTHORITY
40 BROAD STREET, SUITE 500
BOSTON, MA 02109

ENGINEER
TIGHE & BOND
DESIGNER SERVICES, INC.
53 SOUTHAMPTON ROAD
WESTFIELD, MA 01085

PREPARED BY:
Tighe&Bond

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION
COMPLETE SET 9 SHEETS

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Hoover
Elementary
School Roof
Replacement
Project

City Of Melrose

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - G-001.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		
ROOF PHOTOGRAPHS		
SCALE:		AS SHOWN
G-001		



ROOF OVER MAIN BUILDING
NO SCALE

A
-



ROOF EQUIPMENT ON
BALLAST ROOF
NO SCALE

B
-



EXISTING CHIMNEY
NO SCALE

C
-



ROOF ACCESS HATCH
NO SCALE

D
-



DRAIN ON LOWER ROOF
NO SCALE

E
-



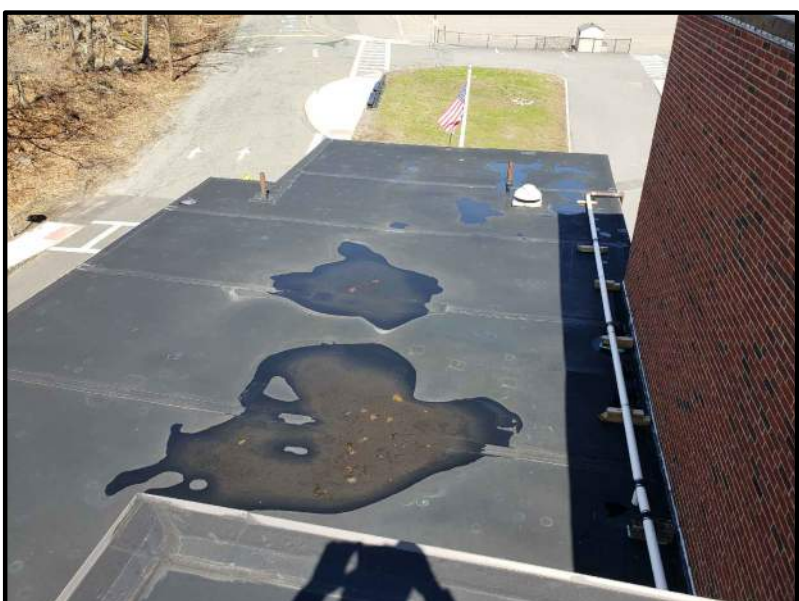
ROOF ON LOWER BUILDING
NO SCALE

F
-



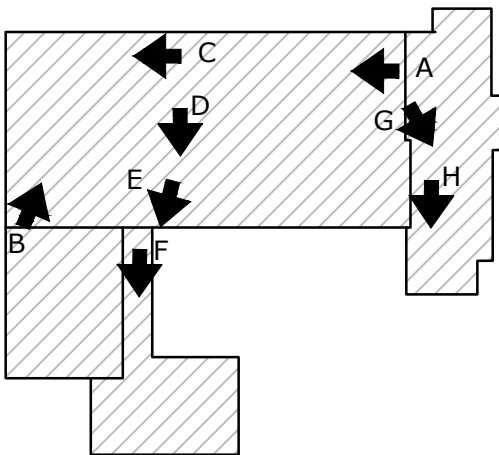
ROOF OVER LOWER BUILDING
NO SCALE

G
-



ROOF OVER LOWER
BUILDING
NO SCALE

H
-



HOOVER KEYPLAN
NO SCALE

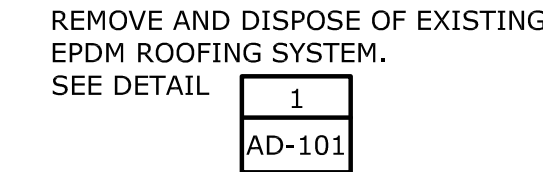
LEGEND:

← A PHOTOGRAPH LOCATION

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - AD-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		

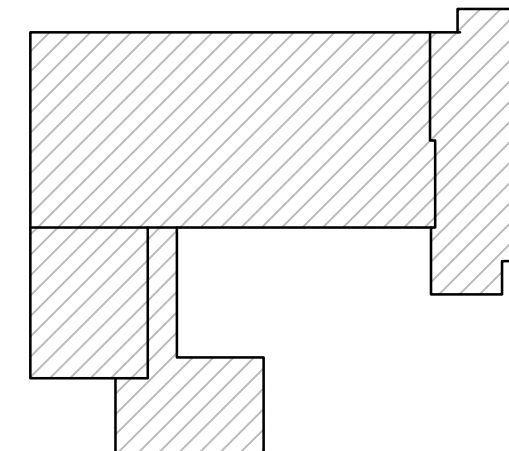
AD-101



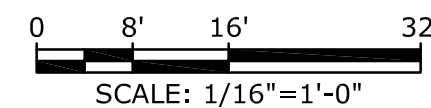
DETAIL	1
3" = 1'-0"	-



DETAIL	2
3" = 1'-0"	-



HOOVER KEYPLAN
NO SCALE



	ROOF DRAIN		EXISTING GOOSENECK (INTAKE OR EXHAUST)
	EXISTING VENT PIPE PENETRATION		EXISTING EXHAUST CAP OR AIR INTAKE
	EXISTING ROOFTOP EXHAUST FAN/DUCT WITH CURB		EXISTING CAPPED CURB
	EXISTING ROOFTOP EQUIPMENT ON SLEEPERS		EXISTING INSULATION THICKNESS TEST CUT
	GAS PIPE ON PIPE SUPPORT		EXISTING CANOPY LINE
			EXISTING ROOF SLOPE LINE
			ITEM TO BE REMOVED/DEMOLISHED

1. REMOVE AND DISPOSE OF ALL EXISTING HVAC EQUIPMENT CURBS.
2. SEE SHEET H-101 FOR HVAC EQUIPMENT REQUIREMENTS.

SCHEMATIC DESIGN
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Hoover
Elementary
School Roof
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Project

City Of Melrose

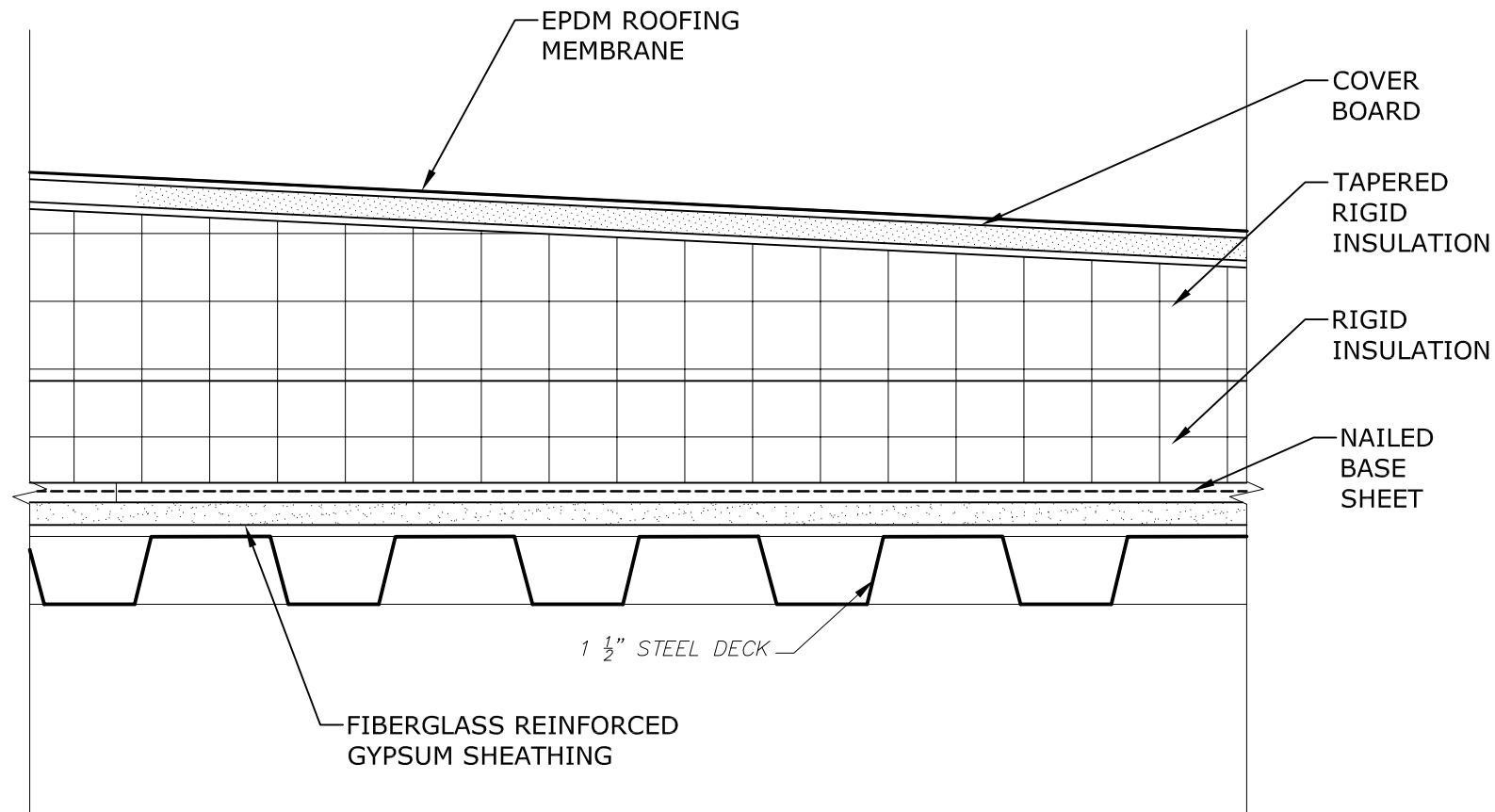
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
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DATE: 06/20/2022		
FILE: M1215-026-HOOVER - A-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: FJH, JPV		

ROOF PLAN

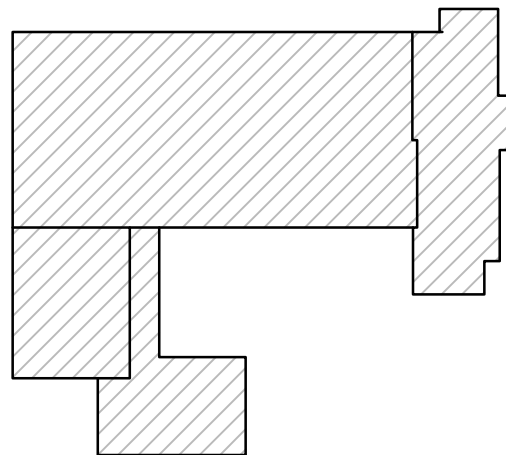
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A-101

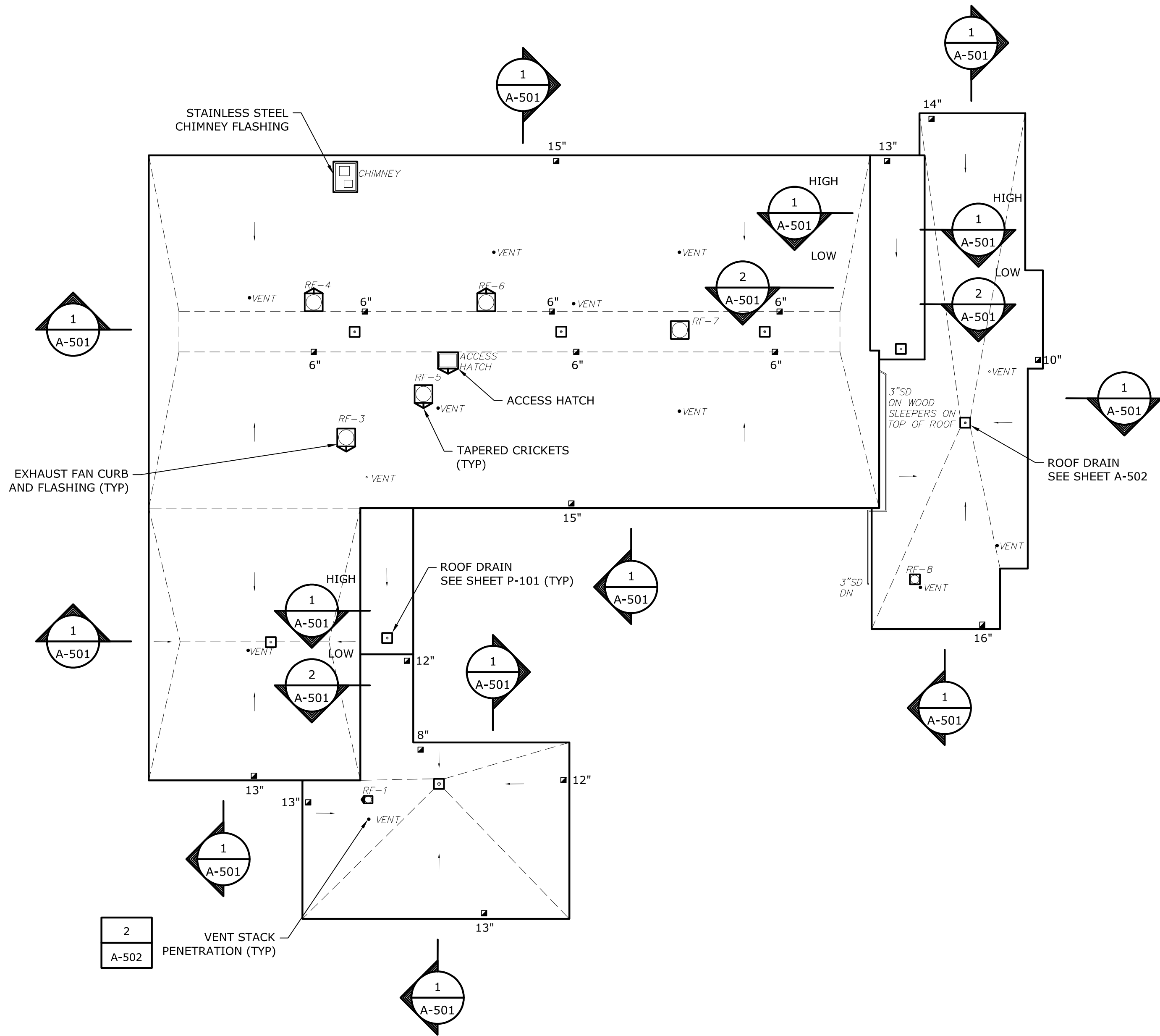
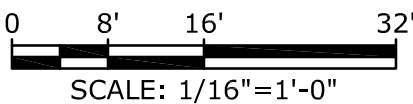


TYPICAL PROPOSED
ROOF SECTION

DETAIL	1
3" = 1'-0"	-



HOOVER KEYPLAN
NO SCALE



LEGEND

- ROOF DRAIN

VENT PIPE PENETRATION

ROOFTOP EXHAUST FAN/DUCT WITH CURB

ROOFTOP EQUIPMENT ON SLEEPERS

G GAS PIPE ON PIPE SUPPORT
- GOOSENECK (INTAKE OR EXHAUST)

EXHAUST CAP OR AIR INTAKE

APPROXIMATE INSULATION THICKNESS

ROOF SLOPE LINE

GUARDRAIL FOR FALL PROTECTION

WALKPAD

ROOF SLOPE DIRECTION

NOTES:

1. INSTALL NEW CURBING FOR ALL HVAC EQUIPMENT. NEW CURBS MUST BE MINIMUM 12" ABOVE NEW ROOFING. INSTALL NEW CRICKETS TO ENSURE PROPER DRAINAGE AT ALL ROOF CURBS.
2. ADJUST ELEVATION OF ROOF EDGES TO MATCH THE MAXIMUM INSULATION THICKNESS AT EACH ROOF DECK ELEVATION TO PROVIDE A LEVEL ROOF PERIMETER.
3. ROOF SLOPE TO BE 1/8" PER FOOT MINIMUM UNLESS NOTED OTHERWISE.

SCHEMATIC DESIGN
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Hoover
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Project

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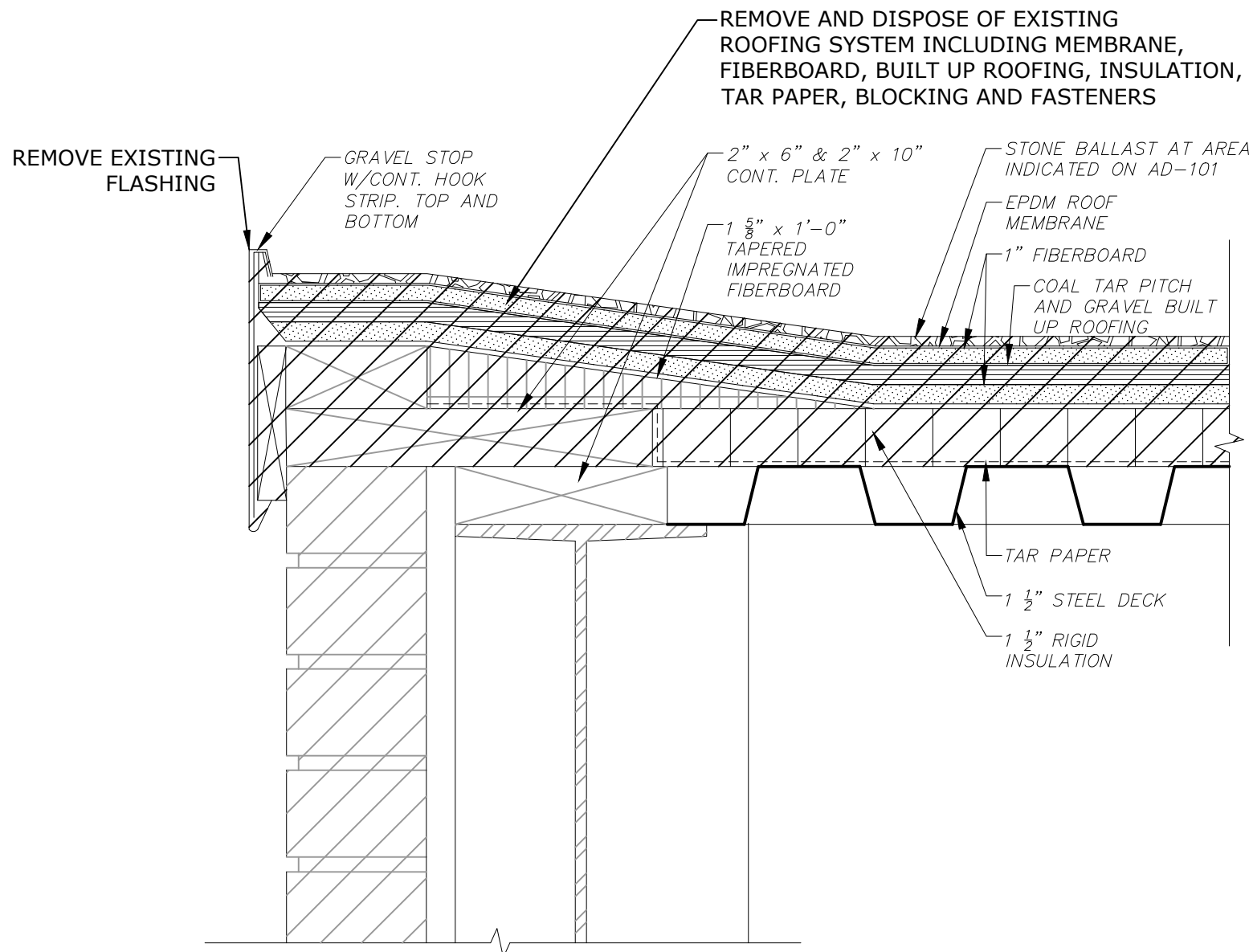
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
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DATE: 06/20/2022		
FILE: M1215-026-HOOVER - A-501.dwg		
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CHECKED: MPW		
APPROVED: JPV		

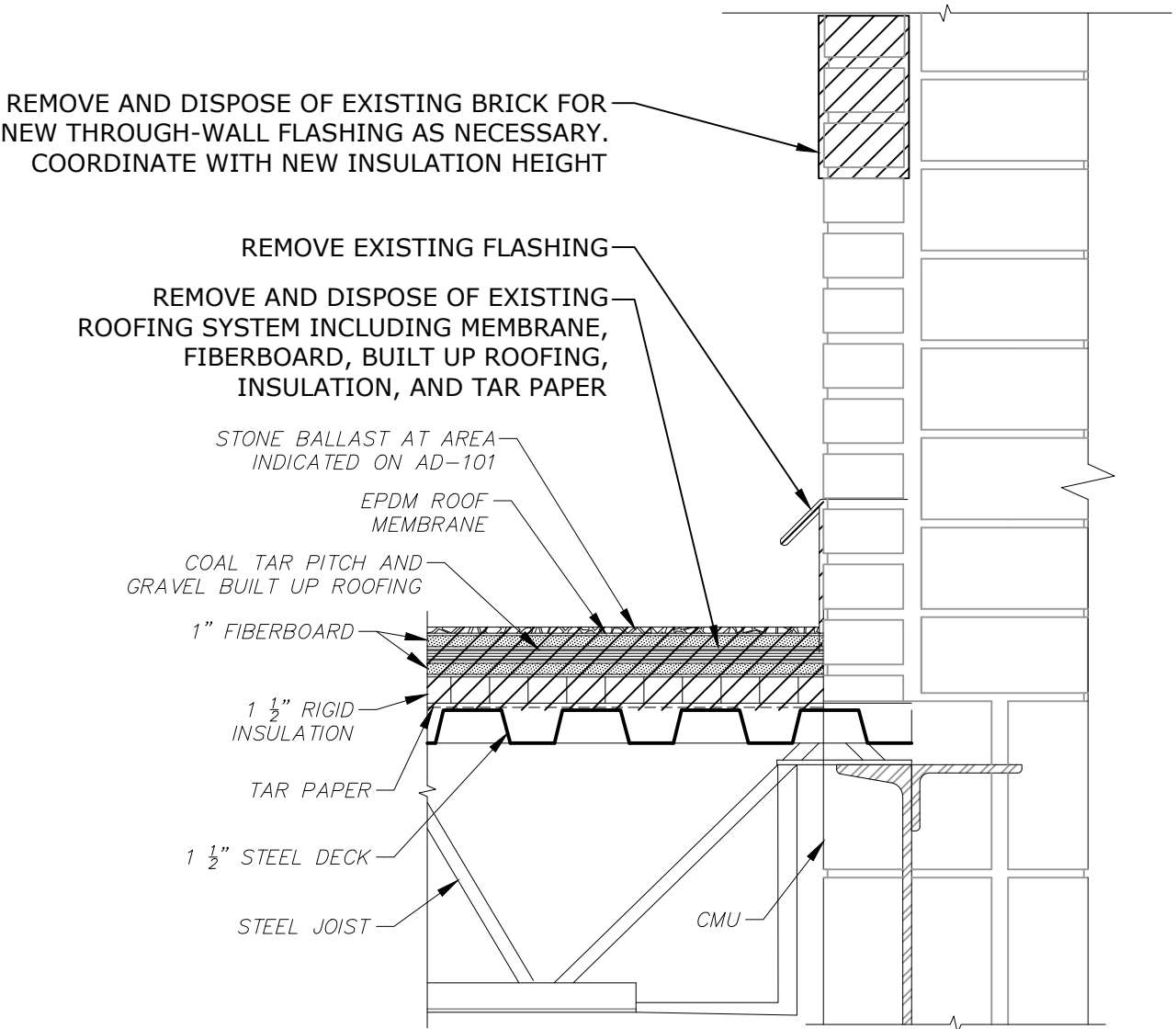
ROOF DETAILS - 1

SCALE: AS SHOWN

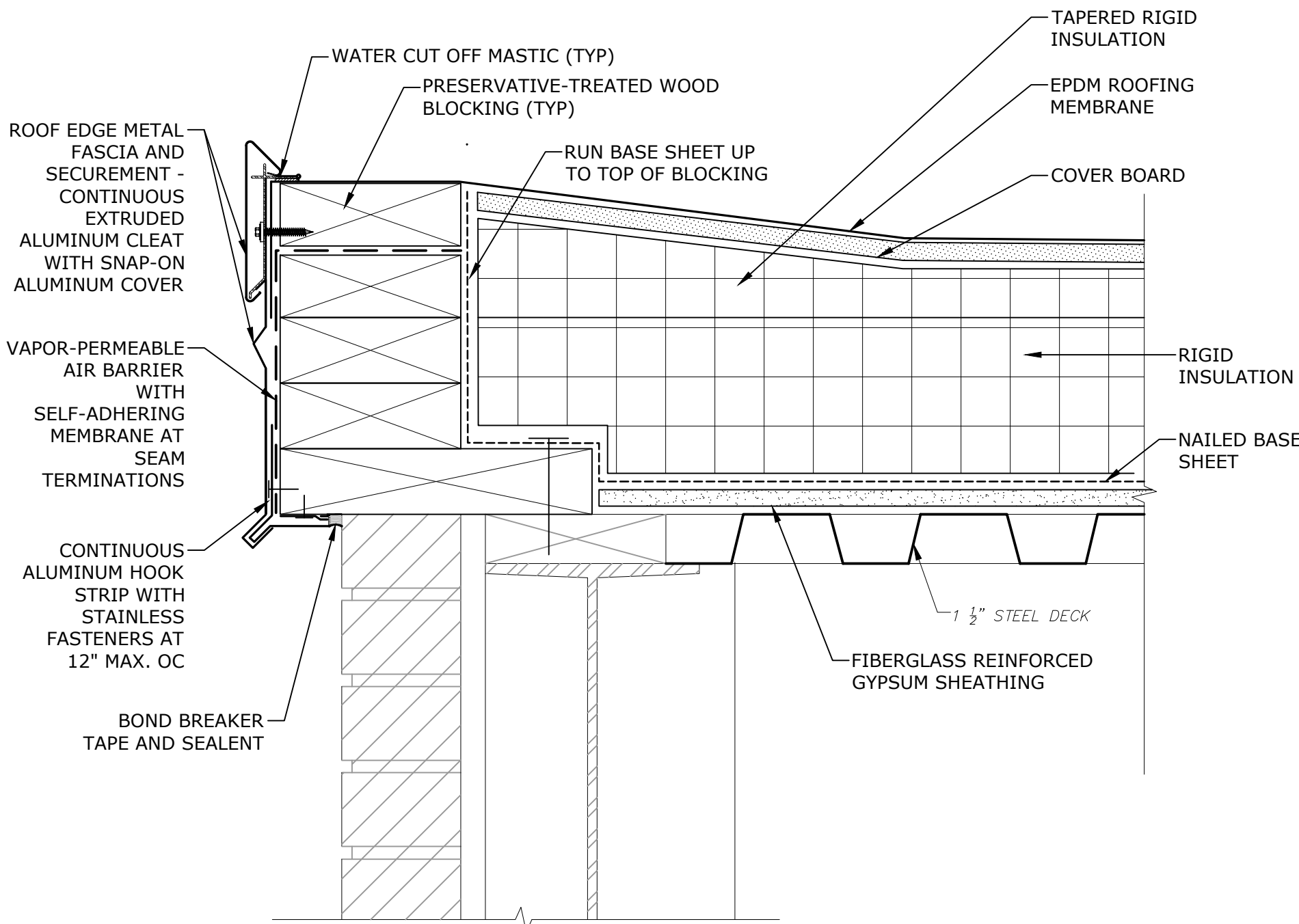
A-501



EXISTING



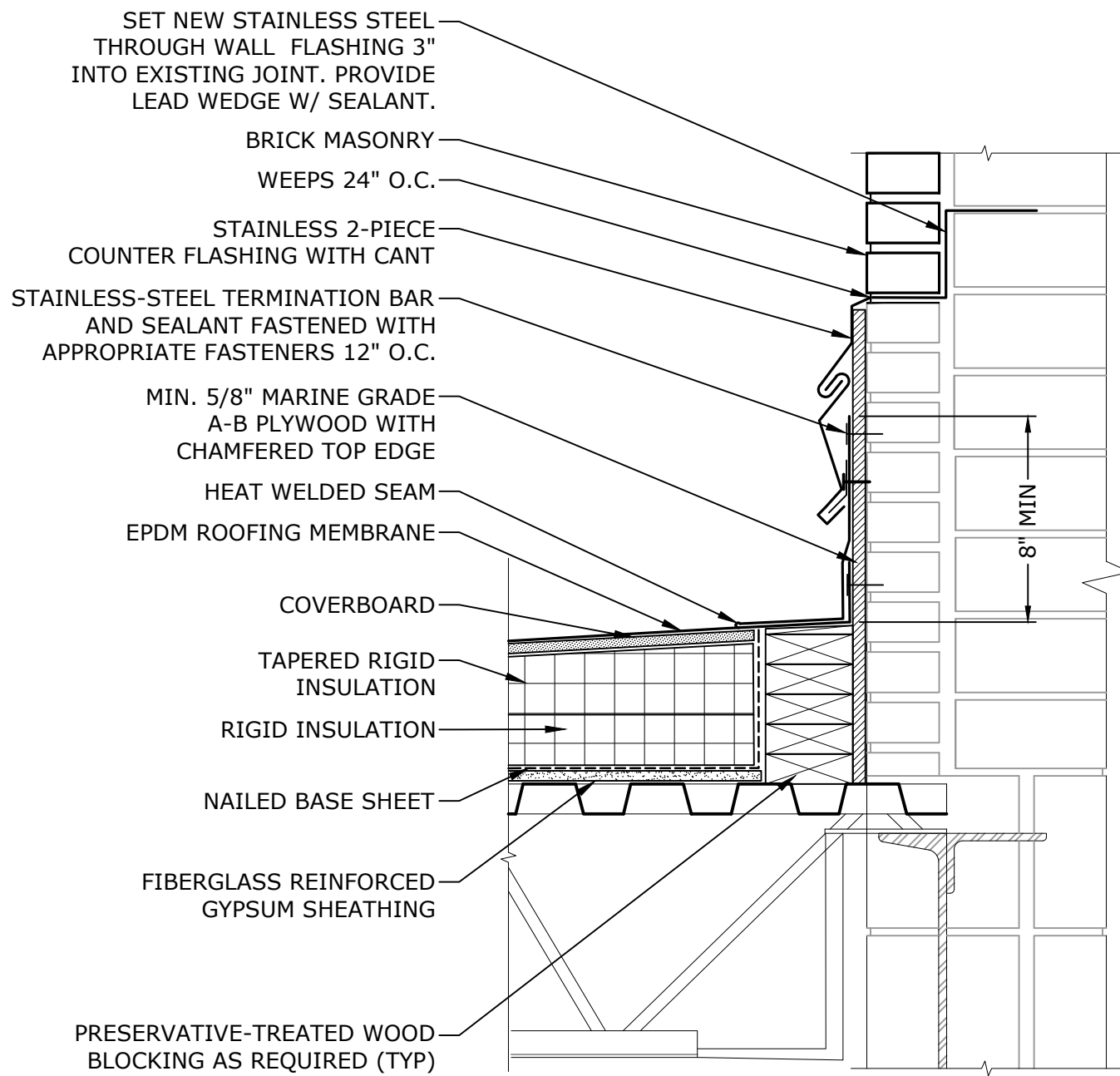
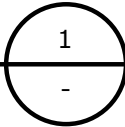
EXISTING



PROPOSED

ROOF EDGE DETAIL

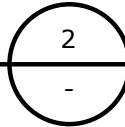
3"= 1'-0"



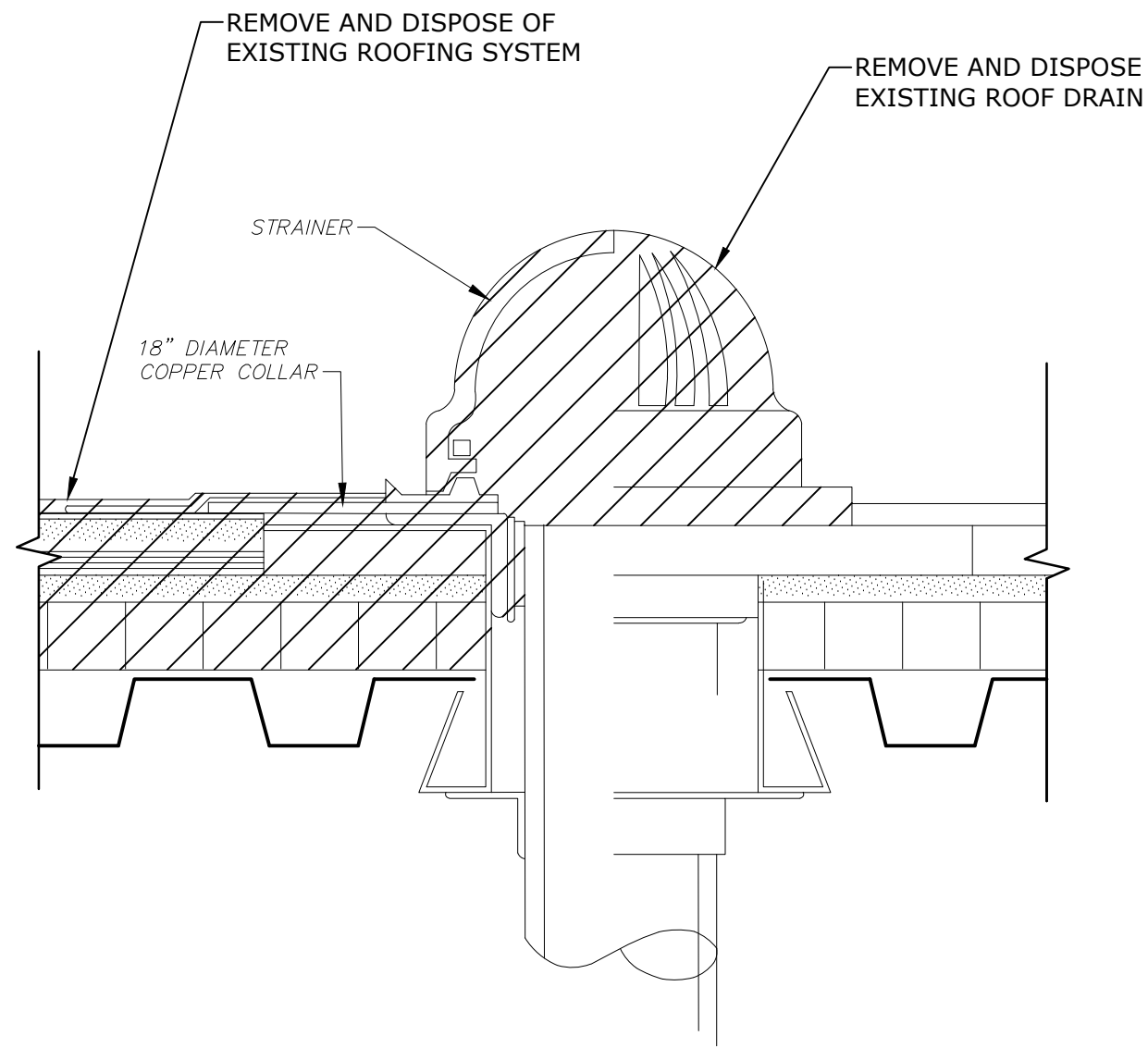
PROPOSED

ROOF TO WALL DETAIL

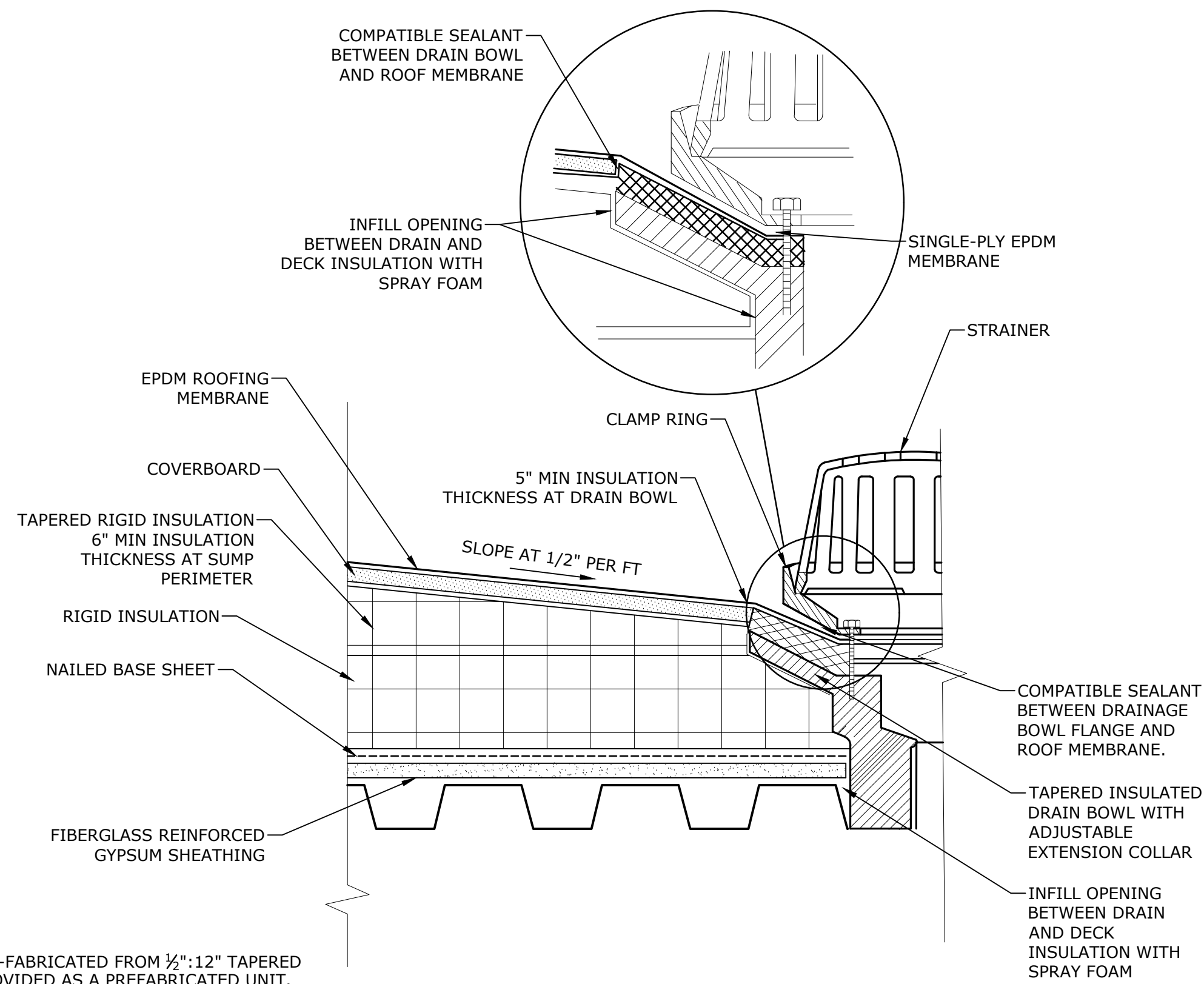
1-1/2" = 1'-0"



Last Saved: 6/27/2022
Plotted On: Jun 27, 2022 1:42pm By: ABS
Tighe & Bond 3:MM1215 (026) Melrose Drawings Figures AutoCAD Hoover Elementary School Sheet M1215-026-HOOVER - A-501.dwg



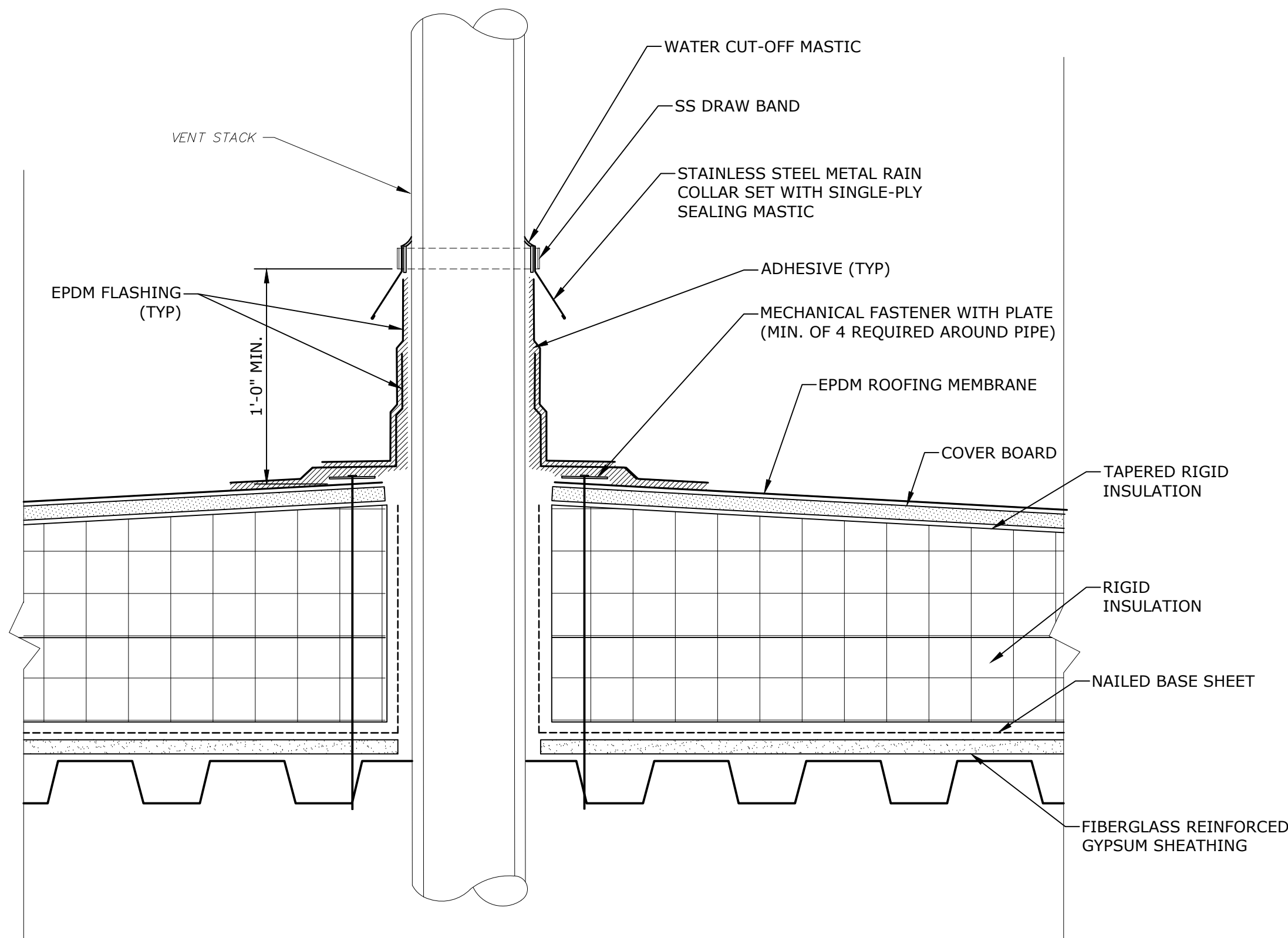
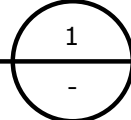
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PROPOSED

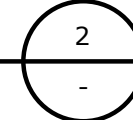
ROOF DRAIN DETAIL

3"=1'-0"



VENT STACK DETAIL

3"=1'-0"



SCHEMATIC DESIGN
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Hoover
Elementary
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City Of Melrose

Melrose,
Massachusetts

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DATE: 06/20/2022		
FILE: M1215-026-HOOVER - A-501.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		

ROOF DETAILS - 2

SCALE: AS SHOWN

A-502

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Hoover
Elementary
School Roof
Replacement
Project

City Of Melrose

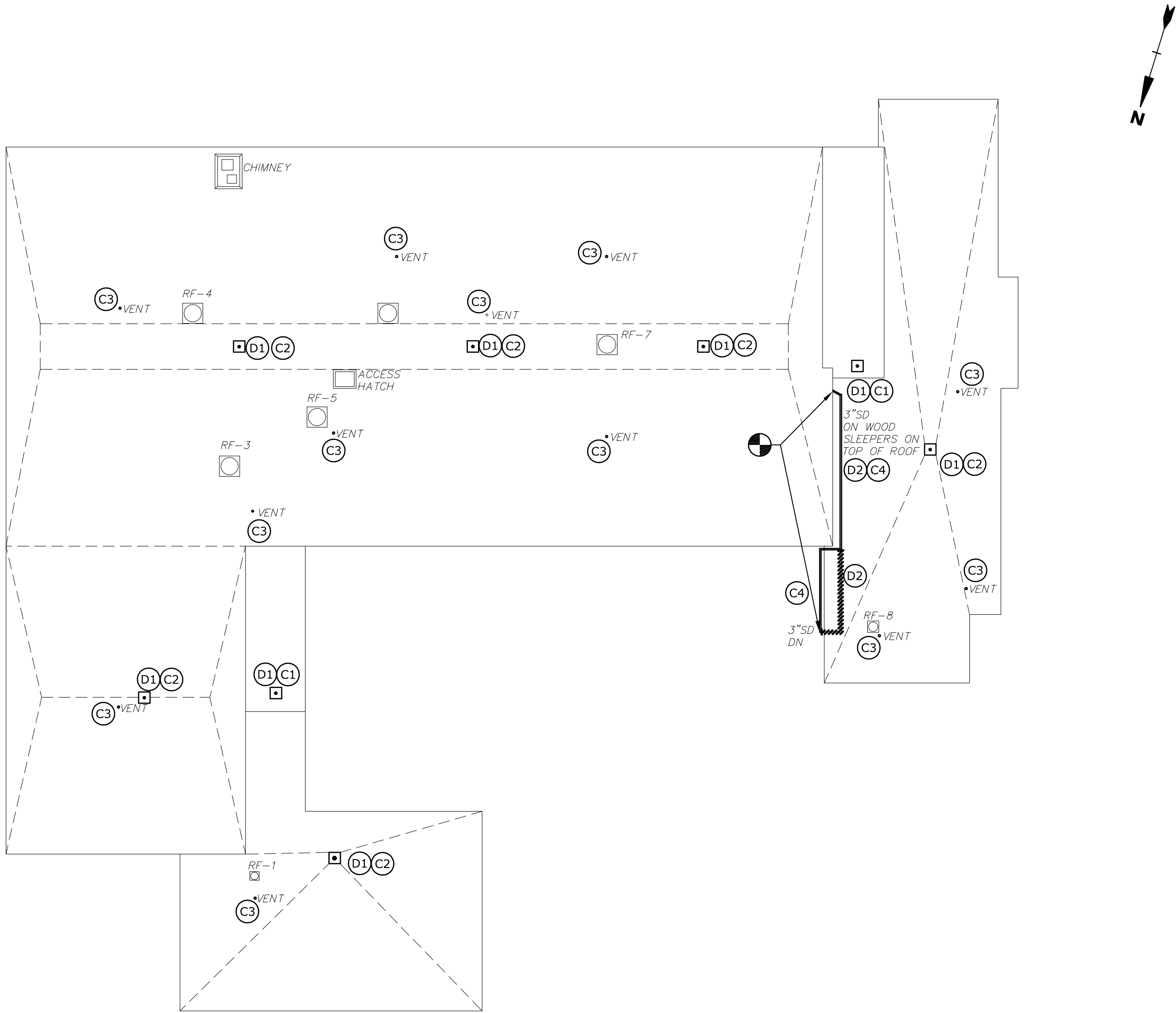
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - P-101.dwg		
DRAWN BY: JM		
CHECKED: MPW		
APPROVED: FJH, JPV		

PLUMBING ROOF PLAN

SCALE: AS SHOWN

P-101



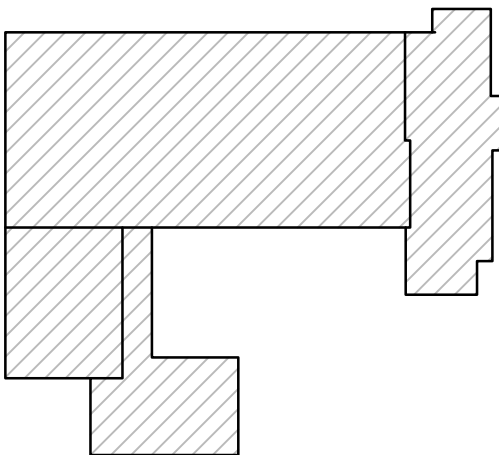
- LEGEND
- ACCESS HATCH
 - ROOF DRAIN
 - VENT PIPE PENETRATION
 - CONNECT TO EXISTING

DEMOLITION KEY NOTES:

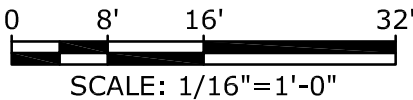
- D1 REMOVE EXISTING ROOF DRAINS. CUT AND CAP EXISTING DRAIN PIPING AWAY FROM DRAIN BODY WITHIN BUILDING. PREPARE FOR FUTURE CONNECTION. COORDINATE EXTENT OF DEMOLITION W/ ROOFING CONTRACTOR TO CONFIRM ADEQUATE CLEARANCE FOR NEW ROOFING INSTALLATION IS PROVIDED.
- D2 DEMOLISH RAIN LEADER AND SLEEPERS BACK TO WALL PENETRATION. DEMOLISH RAIN LEADER TOWARD GROUND AS REQUIRED TO CLEAR ROOF.

CONSTRUCTION KEY NOTES:

- C1 NEW ROOF DRAIN. PROVIDE NEW PIPING FROM DRAIN AND CONNECT TO EXISTING PIPING. INSULATE RD SUMP AND NEW SECTION OF STORM DRAIN PIPING WITH 1-INCH FIBERGLASS INSULATION WITH ASJ. INSULATION THERMAL CONDUCTIVITY TO BE 0.21-0.27 BTU-IN/(h-ft²-°F). ROOF DRAIN OUTLET SIZE AND PIPE SIZE TO MATCH EXISTING. COORDINATE INSTALLATION WITH ROOFING CONTRACTOR.
- C2 NEW ROOF DRAIN. DRAIN TO MATCH OUTLET SIZE OF 4". CONNECT NEW PIPE TO EXISTING STORM DRAINAGE SYSTEM WITHIN THE BUILDING. INSULATE RD SUMP AND NEW SECTION OF STORM DRAIN PIPING WITH 1-INCH FIBERGLASS INSULATION WITH ASJ. INSULATION THERMAL CONDUCTIVITY TO BE 0.21-0.27 BTU-IN/(h-ft²-°F). VERIFY TIE-IN LOCATION IN FIELD. COORDINATE WITH ROOFING CONTRACTOR AND G.C.
- C3 CONFIRM VENT SIZE IN FIELD. EXTEND VENT PIPE WITH SAME SIZE TO TERMINATE 24" ABOVE NEW ROOF.
- C4 PROVIDE NEW CI RAIN LEADER. CONNECT AT WALL PENETRATION, INSTALL WITH 1% PITCH ALONG NEW ROUTING SHOWN, ROUTE ABOVE DOOR TOWARD UNDERGROUND LEADER.

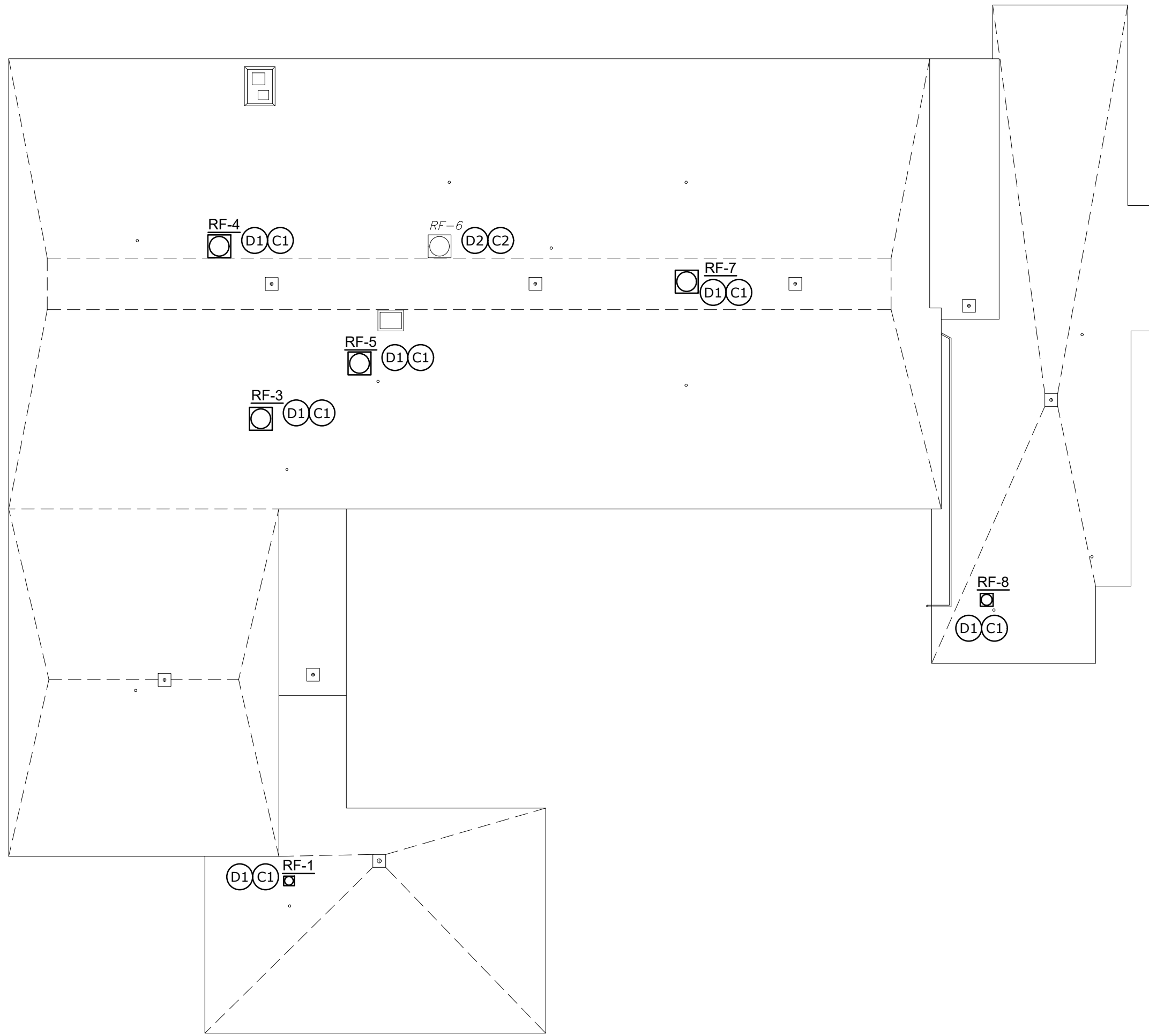


HOOVER KEYPLAN
NO SCALE



SCALE: 1/16"=1'-0"

Last Saved: 6/27/2022
Plotted On: Jun 27, 2022 1:30pm By: ABS
Tighe & Bond 3:16M1215-026-Hoover Elementary School Sheet\1215-026-HOOVER - H-101.dwg



- LEGEND
- ACCESS HATCH
 - EXHAUST FAN

GENERAL NOTES

- VERIFY ALL EXISTING CONDITIONS AND DIMENSIONS PRIOR TO COMMENCEMENT OF WORK. COORDINATE ALL WORK WITH OTHER TRADES.
- THE DRAWINGS ARE DIAGRAMMATIC AND INDICATE THE GENERAL ARRANGEMENT OF SYSTEMS AND WORK INCLUDED IN THE CONTRACT.
- INSTALL EQUIPMENT AND SUPPORTS IN ACCORDANCE WITH ALL RELEVANT BUILDING CODES.
- FIELD VERIFY QUANTITY OF MECHANICAL EQUIPMENT, AND SUPPORTS TO BE REMOVED.
- PERFORM PRE-BALANCE TESTING OF ALL EXHAUST FANS PRIOR TO UNIT REMOVAL, RECORD AIRFLOWS FOR FINAL BALANCING EFFORTS. PROVIDE REPORT TO ENGINEER.
- PROVIDE TEMPORARY CAPS FOR ALL DUCTWORK. NO DUCTWORK SHALL REMAIN OPEN AT ANY TIME.
- DURING DEMOLITION, CONTROL WIRING IS TO BE DISCONNECTED AND PROTECTED FOR FUTURE USES/RECONNECTION.
- PROVIDE NEW HVAC EQUIPMENT PER SCHEDULES. PROVIDE REQUIRED DUCTWORK TRANSITIONS FROM EXISTING DUCTWORK TO NEW FANS AS REQUIRED.
- ALL MATERIALS, METHODS AND EQUIPMENT INSTALLED MUST BE IN COMPLIANCE WITH PROJECT SPECIFICATIONS AND APPLICABLE CODES.

GENERAL DEMOLITION NOTES

- IT IS NOT THE INTENT OF THESE DOCUMENTS TO SHOW EVERY DEVICE, APPURTENANCE, PIPE, WIRE, OR CONDUIT TO BE REMOVED. HVAC EQUIPMENT, UNITS, AND SYSTEMS NOT BEING REUSED SHALL BE REMOVED IN THEIR ENTIRETY INCLUDING ASSOCIATED SUPPORTS.
- PROPERLY DISPOSE OF DEMOLISHED EQUIPMENT IN COMPLIANCE WITH CODES, REGULATIONS, AND DEP STANDARDS. INVENTORY, SALVAGE AND TURN OVER OR DISPOSE OF EQUIPMENT AT DIRECTION OF OWNER.
- ALL EXISTING SYSTEMS SHALL BE MADE FULLY OPERATIONAL, INCLUDING RECONNECTION TO SERVICES AND DUCTWORK.
- EXISTING EQUIPMENT TO BE REMOVED AND RE-INSTALLED SHALL BE FIELD VERIFIED FOR QUANTITY AND CONDITION. KEEP AN ACCURATE RECORD OF STORED EQUIPMENT INCLUDING CONDITION.
- SYSTEMS REQUIRED TO REMAIN IN OPERATION DURING DEMOLITION SHALL BE CAREFULLY PROTECTED FROM DAMAGE AND CONTAMINATION BY THE CONSTRUCTION PROCESS.

DRAWING DEMOLITION NOTES:

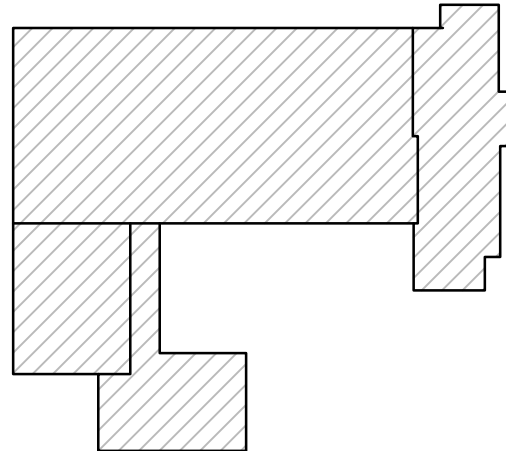
- D1 DISCONNECT, AND DEMOLISH EXHAUST FAN. PROVIDE TEMPORARY CAP OVER DUCT OPENING. MEASURE AIRFLOW OF EXISTING FAN PRIOR TO UNIT REMOVAL.
- D2 DISCONNECT, REMOVE, AND STORE EXHAUST FAN. PROVIDE TEMPORARY CAP OVER DUCT OPENING. EXISTING CURB TO REMAIN.

DRAWING CONSTRUCTION NOTES:

- C1 INSTALL NEW EXHAUST FAN ON CURB, RECONNECT AND SEAL TO EXISTING DUCTWORK. CONNECT FANS TO EXISTING CONTROLS AND BALANCE SYSTEMS TO MATCH SCHEDULED OR EXISTING AIRFLOWS. IF SCHEDULED AND EXISTING AIRFLOWS DIFFER, COORDINATE BALANCING VALUES WITH ENGINEER.
- C2 RE-INSTALL REMOVED FAN ON CURB, RECONNECT AND SEAL TO EXISTING DUCTWORK. CONNECT FAN TO EXISTING CONTROLS AND BALANCE SYSTEMS TO MATCH SCHEDULED OR EXISTING AIRFLOWS.

FAN SCHEDULE															
UNIT NO.	LOCATION	SERVING	MANUFACTURER	TYPE	MODEL	CFM	ESP (IN W.C.)	RPM	BHP [W]	MHP	SPEED CONTROL	ELECTRICAL			REMARKS
												VOLTS	PH	FLA	
RF-1	ROOF	KINDERGARTEN	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	101C17DEC	620	¼	1312	[60]	¼	EC	115	1	0.5	[1][2][3][4][5][6]
FAN 2	KITCHEN	KITCHEN		INLINE FAN	B-12	700	¼	1140	–	¼	–	208	1	–	[9]
RF-3	ROOF	2ND FLOOR CLASSROOMS	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	165C17D(VF)	2000	⅜	892	0.25	½	EC	115	1	4.1	[1][2][3][4][5][6]
RF-4	ROOF	ALL PURPOSE ROOM	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	210C17D(VF)	2500	⅜	597	0.28	½	EC	115	1	4.3	[1][2][3][4][5][6]
RF-5	ROOF	1SR AND 2ND FLOOR TOILETS	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	150C17D(VF)	1500	⅜	921	0.17	¼	EC	115	1	3.2	[1][2][3][4][5][6]
RF-6	ROOF	1ST FLOOR CLASSROOMS	USA VENTILATION SYSTEMS LLC	DOWNBLAST CENTRIFUGAL, BELT DRIVEN FAN W BDD AND DS	DB24RH3S	3640	½	610	–	¾	–	208	3	–	[7][8]
RF-7	ROOF	2ND FLOOR CLASSROOMS	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	165C17D(VF)	2000	⅜	892	0.25	½	EC	115	1	4.1	[1][2][3][4][5][6]
RF-8	ROOF	TEACHERS	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	LCRF-100	375	¼	1256	0.05	⅙	EC	115	1	1.9	[1][2][3][4][5][6]

- SCHEDULE NOTES:
- DEMOLISH AND REPLACE.
 - FURNISH NEW ROOF CURBS (INSTALLED BY GC) WITH NEW FANS. CONFIRM ROOF OPENING, PROVIDE TRANSITION CURBS AS REQUIRED. CURB EDGE MINIMUM 12" ABOVE NEW ROOFING.
 - PROVIDE ELECTRONICALLY COMMUTATED MOTORS (ECMS) AND MOTOR MOUNTED SPEED CONTROLS FOR BALANCING.
 - PROVIDE FACTORY MOUNTED NEMA 3 DISCONNECT SWITCH.
 - PROVIDE HINGED CURB BASE.
 - PROVIDE WITH BAROMETRIC BACKDRAFT DAMPERS.
 - REMOVE, RETAIN, AND RE-INSTALL.
 - REUSE EXISTING CURB AND BLOCKING FOR RETAINED FAN. CURB EDGE MUST BE MINIMUM 12" ABOVE NEW ROOFING, PROVIDE CURB ADAPTER AND/OR CURB EXTENSION AS REQUIRED.
 - EXISTING, NOT IN SCOPE.



HOVER KEYPLAN
NO SCALE

0 8' 16' 32'
SCALE: 1/16"=1'-0"

SCHEMATIC DESIGN
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Hoover
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Replacement
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City Of Melrose

Melrose,
Massachusetts

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FILE: M1215-026-HOOVER - H-101.dwg		
DRAWN BY: JM		
CHECKED: MPW		
APPROVED: FJH, JPV		
HVAC ROOF PLAN		
SCALE:		AS SHOWN
H-101		

SCHEMATIC DESIGN
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Hoover
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City Of Melrose

Melrose,
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A	06/20/2022	SCHEMATIC DESIGN
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FILE: M1215-026-HOOVER - E-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: FJH, JPV		

ELECTRICAL ROOF PLAN

SCALE: AS SHOWN

E-101

GENERAL NOTES

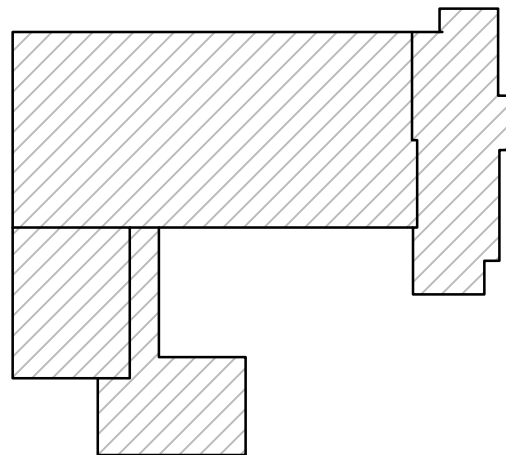
- DISCONNECT AND MAKE SAFE THE EXISTING MECHANICAL EQUIPMENT FOR REMOVAL BY HVAC CONTRACTOR. THE EXISTING FEEDER SHALL BE DE-ENERGIZED AND LOCKED OUT FOR THE DURATION OF THE NEW ROOF WORK. RECONNECT EXISTING FEEDER TO EXISTING AND NEW MECHANICAL EQUIPMENT UPON THE RE-INSTALLATION BY HVAC CONTRACTOR. MODIFY AND EXTEND CONDUIT AND WIRE AS REQUIRED.
- ALL CONDUIT AND CABLE RUNS ACROSS ROOF SHALL BE REMOVED AND REINSTALLED UPON COMPLETION OF ROOF (IF REMOVAL IS NOT ACCEPTABLE SECURE AND MAKE SAFE) UNLESS CONDUITS AND WIRE HAVE BEEN ABANDONED IN WHICH CASE THEY SHALL BE REMOVED PERMANENTLY. ELECTRICAL CONTRACTOR SHALL FIELD VERIFY ALL EXISTING CIRCUITING TO ROOF TOP EQUIPMENT.
- PANELBOARDS SHOWN ARE LOCATED ON FIRST FLOOR.
- PANELBOARD SHOWN ARE LOCATED ON SECOND FLOOR.
- BOLD TEXT AND LINES INDICATE PROPOSED WORK, LIGHT TEXT AND LINES INDICATE APPROXIMATE EXISTING CONDITIONS.
- PROVIDE TEMPORARY POWER AND EQUIPMENT AS REQUIRED TO KEEP SYSTEMS OPERATIONAL, SEE 23 09 93 FOR SEQUENCING AND SCHEDULING.
- THE LOCATIONS OF EXISTING UTILITIES AND EQUIPMENT ARE APPROXIMATE. DETERMINE THE EXACT LOCATION OF EXISTING UTILITIES AND STRUCTURES BEFORE COMMENCING WORK. BE FULLY RESPONSIBLE FOR ANY AND ALL DAMAGE WHICH MIGHT BE OCCASIONED BY FAILURE TO EXACTLY LOCATE AND PRESERVE ANY AND ALL UTILITIES AND STRUCTURES.
- PREVENT DUST FROM BECOMING A NUISANCE OR HAZARD. CONTROL DUST DURING AND AFTER CONSTRUCTION.

GENERAL DEMOLITION NOTES

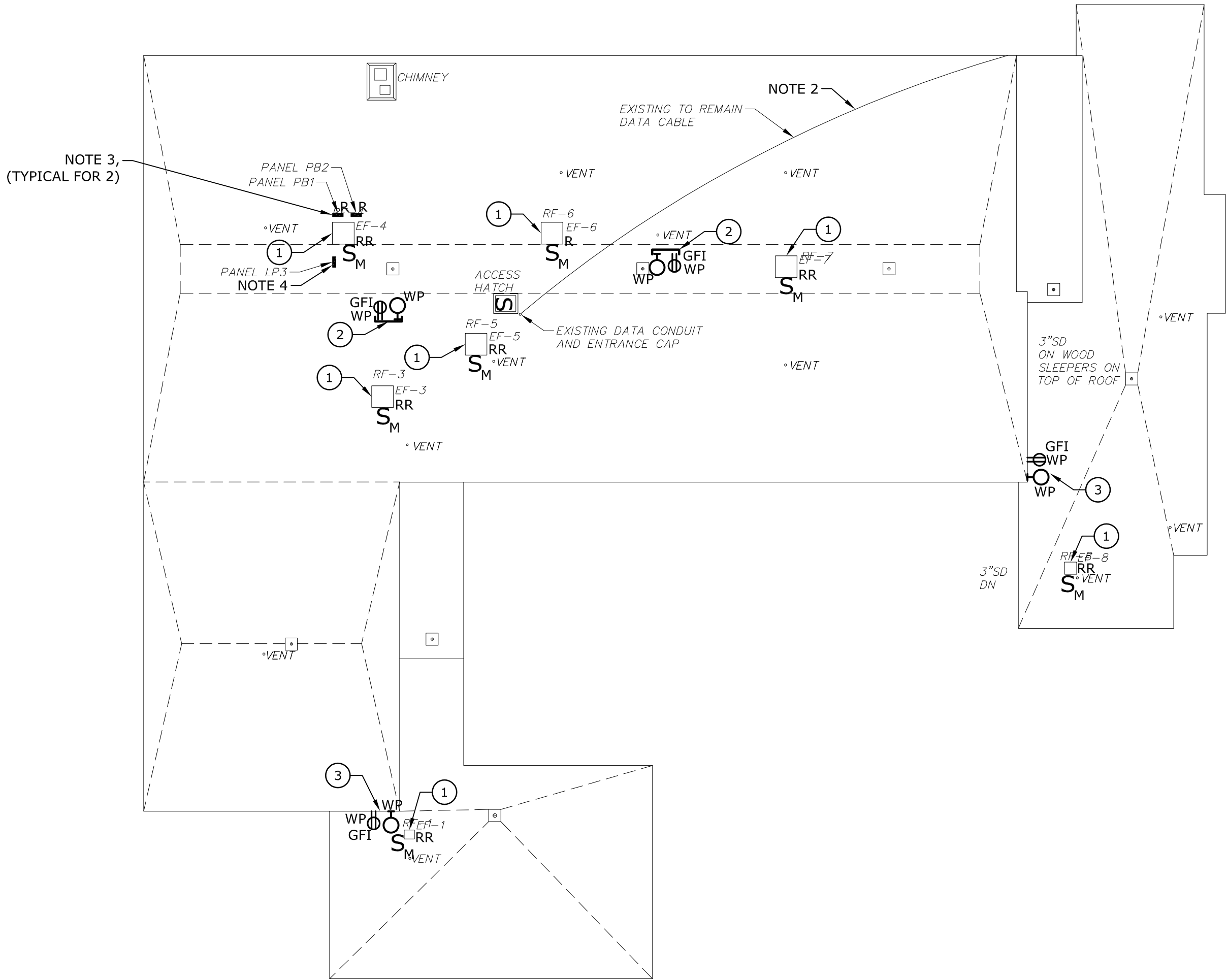
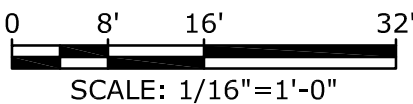
- DEMOLITION SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR. DISCONNECT AND MAKE SAFE BRANCH CIRCUITS, FEEDERS, AS REQUIRED TO ACCOMPLISH THE NEW WORK AS SHOWN OR REASONABLY IMPLIED. THE CONTRACTOR SHALL REFER TO MECHANICAL DRAWINGS OF THIS SET TO DETERMINE THE EXTENT OF THE DEMOLITION WORK REQUIRED.
- BRANCH CIRCUITS SERVING EXISTING DEVICES TO REMAIN AND EXISTING DEVICES TO BE REMOVED SHALL BE MAINTAINED AND RECONNECTED AS REQUIRED AFTER REMOVAL OF THE EXISTING DEVICES, AS NECESSARY TO ACCOMMODATE THE ALTERATIONS.
- COORDINATE WITH THE ENGINEER, GENERAL, AND MECHANICAL CONTRACTORS FOR EXISTING EQUIPMENT TO BE DISCONNECTED AND REINSTALLED.
- THE CONTRACTOR SHALL REMOVE ALL WIRING/CABLING NO LONGER IN USE FROM EXISTING CONDUITS. CONDUITS NO LONGER IN USE SHALL BE CUT BACK AS REQUIRED AND CAPPED.
- REFER TO SPECIFICATIONS FOR ADDITIONAL DEMOLITION CRITERIA.
- CONTRACTOR SHALL ASSUME MATERIALS TO BE DEMOLISHED ARE POSITIVE FOR HAZARDOUS MATERIALS AND DISPOSE OF AS NECESSARY IN ACCORDANCE WITH APPLICABLE REGULATIONS. REFER TO SPECIFICATIONS FOR MORE DETAILS.
- OWNER RETAINS RIGHT OF FIRST REFUSAL FOR ALL ITEMS TO BE REMOVED OR DEMOLISHED. CONTRACTOR SHALL TAKE REASONABLE CARE TO AVOID DAMAGE TO ITEMS TO BE RETAINED BY OWNER. NO ADDITIONAL CHARGE WILL BE ALLOWED FOR REMOVAL OF SALVAGEABLE ITEMS.
- PROPERLY DISPOSE OF DEMOLISHED EQUIPMENT IN COMPLIANCE WITH CODES, REGULATIONS, AND DEEP STANDARDS.

ELECTRICAL KEY NOTES

- DISCONNECT EXISTING EQUIPMENT. SECURE CONDUCTORS AND MAKE SAFE FOR ROOF INSTALLATION. LOCK OUT TAG OUT CIRCUIT AT LOCAL OVERCURRENT PROTECTION DEVICE. RECONNECT TO REINSTALLED OR NEW EQUIPMENT. SEE GENERAL NOTE 1. REFER TO HVAC DRAWINGS FOR DETAILS.
- ROOF TOP WEATHERPROOF GFI RECEPTACLES AND LIGHTS SHALL BE MOUNTED ON ¾" RIGID CONDUIT 18" AFF. LUMINAIRE SHALL BE MOUNTED 6" AFF.
- ROOF TOP WEATHERPROOF GFI RECEPTACLES, SWITCH AND LIGHTS SHALL BE MOUNTED TO EXTERIOR WALL. GFI SHALL BE MOUNTED 18" AFF, LUMINAIRE SHALL BE MOUNTED 6" AFF.



HOOVER KEYPLAN
NO SCALE



ELECTRICAL ROOF PLAN
1/16" = 1'0"

DEMOLITION LEGEND

"RR" EXISTING DEVICE TO BE REMOVED. EXISTING BRANCH CIRCUIT, WIRING AND CONDUIT SHALL BE UTILIZED FOR NEW EQUIPMENT IN EXACT LOCATION. MODIFY AND EXTEND WIRE AND CONDUIT AS REQUIRED. SEE GENERAL DEMO NOTES FOR ADDITIONAL INFORMATION.

"R" EXISTING DEVICE TO REMAIN ACTIVE AS-IS. SEE GENERAL DEMO NOTES FOR ADDITIONAL INFORMATION.

RECEPTACLES

MOUNTED AT 18" AFF UNLESS OTHERWISE NOTED.
NUMBERS/LETTERS SHOWN BESIDE RECEPTACLES SHALL INDICATED THE FOLLOWING:
"GFI" INDICATES INTEGRAL GROUND FAULT INTERRUPTER.
"2" (NUMBER OR PANELBOARD NAME AND NUMBER) INDICATES POWER CIRCUIT NUMBER.

Φ DUPLEX RECEPTACLE.

POWER DISTRIBUTION EQUIPMENT

□ PANELBOARD, SURFACE MOUNTED
S_M LOCKABLE MOTOR RATED TOGGLE SWITCH.
NUMBER OF POLES AS REQUIRED BY LOAD.

**MSBA Accelerated Repair Program
Horace Mann Elementary School
Hoover Elementary School
Roof Replacement project
Melrose, MA**

**Schematic Design Estimate
June 27, 2022**

Tighe & Bond



198 North Washington St, #109, Boston MA 02114



**MSBA Accelerated Repair Program
Roof Replacement project
Melrose, MA
Schematic Design Estimate
BASIS OF ESTIMATE**

6/27/2022

Roof Replacement project

DOCUMENTATION

This estimate was prepared from the following information:

Schematic Design Drawings provided by Tighe & Bond design team, dated June 20, 2022

BASIS FOR PRICING

This estimate reflects the current construction value for the construction of this project and should not be construed as a prediction of a low bid. Prices are based on local prevailing wage construction costs at the time the estimate was prepared.

PROJECT OUTLINE

The project consists of roof replacement at Horace Mann Elementary School and Hoover Elementary School in Melrose, MA.

QUALIFICATIONS

Owner costs and fees are excluded

ITEMS NOT CONSIDERED IN THIS ESTIMATE

Items not included in this estimate are:

Overtime outside industry standard

Work outside normal hours of operation

Preconstruction fees

Utility Company Charges or Hook-up fees have been excluded

No permits or special fees have been included

Third party commissioning costs.

Owner supplied and/or installed items (e.g.. Draperies, furniture and equipment)

Loose Furniture and Equipment

Owner Supplied and Installed Furniture, Fixtures and Equipment

Relocation / move costs

Air Quality monitoring / Vibration monitoring

Loose technology equipment (i.e. Computers, Printers, Etc.)

The estimate assumes all long-lead items can be pre-purchased to meet schedule requirements.

The estimate is based on the premise that the design will meet all codes, laws, ordinances, rules, and regulations in effect at the time that the estimate was prepared. The estimate shall be adjusted should any discrepancies between design

and the aforementioned codes, laws or ordinances result in, or require, an increase in the Cost 'of the Work

Items identified in the design as Not In Contract (NIC)

Builder's Risk insurance, terrorist insurance and other Owner insurances



Roof Replacement project

June 27, 2022

Hoover Elementary School

Melrose, MA

Schematic Design Estimate

		17,714 GSF		
		Cost / SF		
02 Existing Conditions		340,899	19.24	25.5%
04 Masonry		16,200	0.91	1.2%
05 Metals		157,086	8.87	11.7%
06 Wood, Plastics, and Composites		28,464	1.61	2.1%
07 Thermal & Moisture Protection		654,165	36.93	48.9%
22 Plumbing		32,685	1.85	2.4%
23 HVAC		63,526	3.59	4.8%
26 Electrical		44,124	2.49	3.3%
TOTAL DIRECT COST		1,337,148	75.49	100%
Design Contingency	15.00%	200,572	11.32	
General Conditions and General Requirements	11.50%	176,838	9.98	
Permits and fees	excluded	-	-	
Contractor's OH&P	5.00%	76,886	4.34	
Escalation (midpoint 2Q 2023)	5.00%	89,572	5.06	
Construction Contingency	excluded	-	-	
TOTAL ESTIMATED CONSTRUCTION COST		1,881,016	106.19	



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Hoover Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
1	02 Existing Conditions						
2	024100 <i>Selective Demolition</i>						
3	<i>Roof Demolition</i>						
4	Remove and disposed of existing roof - see Hazardous Materials Assessment	17,714	sf		Included		
5	Premium remove original tar & gravel roof system	13,450	sf	4.50	60,525		
6	Roof drain remove	7	ea		with plumbing		
7	Remove and dispose of access hatch	1	ea	450.00	450		
8	Existing insulation thickness test cut	4	ea	150.00	600		
9	Remove and dispose of all exiting exhaust fence curb and flashing	104	lf	18.00	1,872		
10	Remove and dispose of chimney flashing	24	lf	6.50	156		
11	Remove and dispose of vent flashing	10	ea	40.00	400		
12	Cutting and patching	1	ls	3,500.00	3,500		
13	Dispose, cart away	1	ls	4,400.00	4,400		
14	Temporary roof protection	17,714	sf	1.20	21,257		
15	Dust control	1	ls	6,200.00	6,200		
16	Allowance for overhead protection building entrance below.	120	sf	20.00	2,400		
17							
18	026000 <i>Hazardous Materials Assessment</i>						
19	ACM & PCB Abatement of roof	17,714	sf	13.50	239,139		
20							
21	Subtotal: Existing Conditions					\$ 340,899	
22							
23	04 Masonry						
24	041000 <i>Masonry Units</i>						
25	Masonry work associated with installing thru-wall flashing	216	lf	75.00	16,200		
26							
27	Subtotal: Masonry					\$ 16,200	
28							
29	05 Metals						
30	051000 <i>Structural Steel Framing</i>						
31	Structural improvements	1	ls	150,000.00	150,000		
32	053000 <i>Metal Decking</i>						
33	Roof deck replacement at Roof B1 damaged areas, assumed 5% of roof area	886	sf	8.00	7,086		
34							
35	Subtotal: Metals					\$ 157,086	
36							
37	06 Wood, Plastics, and Composites						
38	061600 <i>Rough Carpentry</i>						
39	Install new curbing for all HAVC equipment 12" above new roof	94	lf	48.00	4,512		
40	New 3x Pressure treated blocking at roof edge	998	lf	24.00	23,952		
41							
42	Subtotal: Wood, Plastics, and Composites					\$ 28,464	
43							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Hoover Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
44	07 Thermal & Moisture Protection						
45	075000 Membrane Roofing						
46	New Construction						
47	90 mil EDPM roofing system; 30 year warranty	17,714	sf	30.00	531,420		
48	Tapered crickets	4	ea	80.00	320		
49	New walkway pad, assumed 10% of roof area	1,771	sf	6.50	11,514		
50							
51	076500 Flashing and Sheet Metal						
52	Roof edge metal fascia and securement, continuous extruded aluminum cleat, continuous aluminum hook strip with stainless fasteners	998	lf	49.00	48,902		
53	Snap-on aluminum cover	998	lf	38.00	37,924		
54	New flashing at HAVC equipment curbing	94	lf	14.00	1,316		
55	Stainless steel chimney flashing	20	lf	32.00	640		
56	Access hatch flashing	16	lf	18.00	288		
57	Vents pipe flashing	12	ea	85.00	1,020		
58	Roof drain flashing	8	ea	350.00	2,800		
59	Wall and roof flashing	216	lf	18.00	3,888		
60	Misc. roof flashing	1	al	2,000.00	2,000		
61							
62	077100 Roof Specialties						
63	Access hatch	1	ea	4,250.00	4,250		
64							
65	079100 Joint Sealants						
66	Exterior caulking and sealants at all roof penetrations	17,714	sf	0.45	7,883		
67							
68	Subtotal: Thermal & Moisture Protection					\$ 654,165	
69							
70	22 Plumbing						
71	Demolition						
72	Roof drains	8	ea	332.10	2,657		
73	New						
74	Sanitary vent system						
75	Extend vent piping to 24"	12	ea	570.00	6,840		
76							
77	Roof drainage system						
78	Roof drain including new piping/insulation and tie-in to existing, Allowance	8	ea	1,648.50	13,188		Assume 4" drains
79							
80	Materials supply and bidding/market conditions allowance	1	ls	5,000.00	5,000		
81	Supervision/PM	1	ls	5,000.00	5,000		
82							
83							
84	Subtotal: Plumbing					\$ 32,685	
85							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Hoover Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
86	23 HVAC						
87	Demolition						
88	Disconnect mechanical piping and ductwork from units and remove and store units for reinstallation, Allowance	15	ea	934.00	14,010		
89	Remove obsolete equipment, Allowance	1	ls	4,000.00	4,000		Quantity/type not indicated
90							
91	New						
92	Re-set units and extend mechanical piping and ductwork	15	ea	1,401.04	21,016		
93							
94	Miscellaneous to include seismic controls and testing/start-up	1	ls	3,500.00	3,500		
95	Materials supply and bidding/market conditions allowance	1	ls	15,000.00	15,000		
96							
97	Supervision/PM	1	ls	6,000.00	6,000		
98							
99	Subtotal: HVAC					\$ 63,526	
100	26 Electrical						
101	Demolition						
102	Antenna, to be reinstalled	3	ea	300.00	900		
103	Conduit/wire, lighting	364	lf	11.64	4,237		
104	Electrical fixture, disconnect only, Allowance	11	ea	200.00	2,200		Fixture' description not provided
105							
106	New						
107	Lighting system						
108	Conduit/wire	364	lf	25.24	9,187		
109							
110	Miscellaneous						
111	Antenna, install previously removed	3	ea	450.00	1,350		
112	Electrical fixture, reconnect, Allowance	11	ea	250.00	2,750		
113							
114	Miscellaneous to include seismic controls and testing/start-up	1	ls	500.00	500		
115	Materials supply, small job premium and bidding/market conditions allowance	1	ls	20,000.00	20,000		
116							
117	Supervision/PM	1	ls	3,000.00	3,000		
118							
119	Subtotal: Electrical					\$ 44,124	
120							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

HERBERT CLARK HOOVER ELEMENTARY SCHOOL MELROSE, MA PRE-RENOVATION HBMA SERVICES

TO: Denise M. Gaffey – Directory and City Planner – City of Melrose
FROM: Frank Rodrigues – Tighe & Bond
COPY: Matthew Wzorek – Tighe & Bond
DATE: June 8, 2022

Tighe & Bond Inc., (Tighe & Bond) has prepared the following technical memorandum to summarize the Hazardous Building Material Assessment (HBMA) conducted at the Herbert Clark Hoover Elementary School. (the "Site"). A facility improvement project, which includes full replacement of the existing roof is currently proposed for the school building. The current roof systems consists of a rubber membrane roof system over a tar and gravel/built up roof applied onto a metal roof deck. The HBMA was limited to the roof area being proposed for renovation impact and did not include the roof of the modular classroom section of the school. As required by state and federal regulations, characterization of various waste streams generated during construction projects must be completed to ensure their proper management.

The Assessment included a visual observation and bulk sampling of suspect hazardous building materials (asbestos, painted/coated building materials), and a visual inventory of other hazardous/regulated wastes (i.e., mercury-containing equipment, refrigerants, PCB-containing equipment, etc.). The HBMA was performed to support the proposed facility improvement project and to address/prepare budgets for management of environmentally related building materials.

Tighe & Bond's assessment and report are subject to the HBMA Limitations provided as Appendix A. The Assessment was performed on May 20, 2022, by Tighe & Bond's Massachusetts licensed asbestos inspector, Francisco J. Rodrigues, (#AI040131). Mr. Rodrigues' inspector license and certification are included as Appendix B of this report.

1 Hazardous Building Materials Assessment

1.1 Asbestos-Containing Building Materials

Prior to any type of building renovation or demolition, a thorough investigation is required to identify and quantify asbestos containing materials (ACM) which may be impacted by the demolition or renovation activities. The survey is required by the United States Environmental Protection Agency (EPA) National Emissions Standard for Hazardous Air Pollutants (NESHAP) regulations (Title 40 CFR, Part 61, Subpart M); Massachusetts Department of Environmental Protection (MassDEP) regulations (310 CMR 7.15); Massachusetts Department of Labor Standards (MADLS) regulations, (454 CMR 28.00); as well as applicable portions of the Occupational Safety and Health Administration (OSHA) asbestos in construction regulations (CFR 1926.1101).

The asbestos assessment was limited to accessible areas of the roof and roof top equipment to determine the presence or absence of suspect ACM that have potential for disturbance

during the proposed renovation activities and would be subject to abatement prior to roof replacement.

Suspect materials were divided into "homogeneous materials", building materials which were determined by the inspector to be homogeneous based on their color, texture, and age. A number of bulk samples of suspect ACM from each homogenous group of materials were collected in general accordance with standards described in the Environmental Protection Agency (EPA) Asbestos Hazard and Emergency Response Act (AHERA) Regulations for schools. AHERA sampling protocols are only recommended for use by MassDEP and EPA as they do not regulate bulk sampling standards.

Bulk samples were collected and submitted to Aerobiology Laboratories Associates Inc., (Aerobiology) of Woburn, Massachusetts for analysis via Polarized Light Microscopy with Dispersion Staining (PLM/DS) in accordance with the EPA/600/R-93/116 Method. ProScience is a Massachusetts licensed and American Industrial Hygiene Association (AIHA)-accredited asbestos laboratory.

Suspect materials identified and sampled are included as inventory tables in Appendix C. The tables describes material locations, sample numbers, quantities, condition, analytical results, and specific comments relative to our findings. The asbestos laboratory report is included in Appendix D.

The MassDEP defines a material that contains greater than or equal to one percent ($\geq 1\%$) asbestos utilizing PLM/DS, as being an ACM. Materials that are identified as "none detected" are specified as not containing asbestos. Materials containing less than one percent ($< 1\%$) asbestos are regulated to a degree by OSHA related to work practices, worker exposure, and waste containerization and in Massachusetts, materials containing $< 1\%$ asbestos are considered asbestos-containing waste material (ACWM) and must be packaged and disposed of as ACWM in accordance with 310 CMR 7.15.

A total of five homogeneous areas were identified during the inspection and 14 samples of suspect ACM were collected. The tar and gravel/built up roof system located under the rubber membrane roof system was determined to contain $< 1\%$ asbestos and therefore classified as an ACWM.

Samples of other suspect ACM collected during the survey, were determined to be non-asbestos containing. Refer to Appendix C for a list of each suspect material identified and sampled.

Other suspect materials encountered during any renovation activities that are not identified in this report as being non-ACM should be assumed to be ACM until sample collection and laboratory analysis indicate otherwise.

The tar and gravel/built up roof identified at the Hoover School must be managed and disposed of as an ACM.

The ACMs identified at the Hoover School should be removed by a licensed asbestos abatement contractor, utilizing trained and licensed personnel prior to renovation, demolition or any activity that has the potential to disturb these materials. Tighe & Bond recommends the creation of a project specific asbestos abatement scope of work or technical specification for the removal of ACWM. The specification must be developed by a Massachusetts licensed asbestos project designer, and it should address such important issues as regulatory requirements, notification procedures, insurance considerations, air sampling needs and other pertinent information. Abatement activities must be subject to a passing post abatement visual inspection by an asbestos monitoring firm not affiliated with the abatement contractor.

The same firm typically collects, analyzes and reports the State required post abatement clearance air samples.

1.2 Universal Waste and Other Regulated Building Waste

Tighe & Bond performed a visual inspection of the proposed renovation areas to identify hazardous materials, universal waste materials or other regulated wastes that have the potential for disturbance during the roof replacement project. No regulated wastes were identified.

1.3 Lead Based Paint (LBP)

Paint chip sampling was performed to identify lead paint concentrations in those painted components likely subject to impact by renovations. Specifically, one sample was collected from the fascia board which is scheduled to be replaced.

The OSHA 1926.62 Lead in Construction regulations require worker protection and the use of certain work practices if painted building components with detectable levels of lead paint are disturbed during a demolition or renovation. The result of the sampling is intended to provide guidance to contractors for occupational lead exposure controls as it is the responsibility of the contractor to ensure the safety of their employees. Contingent upon renovation or demolition methods, building components coated with lead levels may cause exposures to lead above OSHA standards during proposed renovation or demolition activities.

One suspect lead paint sample was collected from the painted fascia board and was submitted to Aerobiology analysis using the SW846-7420/3051 method. A summary of the test result is presented in Appendix E. The Aerobiology laboratory report is located in Appendix F.

The result of the paint chip sampling performed by Tighe & Bond indicates the paint chip sample collected and analyzed was below the EPA regulatory threshold limit for lead based paint.

Although results were below regulatory thresholds, compliance with OSHA Lead in Construction is required for detectable levels of lead. Lead-containing painted building components should not be subjected to dust-generating activities such as sanding, grinding, sawing, etc. Also, lead-containing painted building materials should not be subject to torch cutting. An LBP determination cannot determine a safe level of lead but is intended to provide guidance for implementing industry standards for lead in paint at identified locations. With this data contractors can better determine potential exposure of workers to airborne lead by understanding the different concentrations of LBP and activities that disturb paint on representative surfaces.

Based on the reportable levels of lead on the painted components tested and subject to waste characterization requirements of the disposal facility, the contractor may be required to conduct Toxicity Characteristic Leaching Procedure (TCLP) testing of the remaining painted waste stream prior to disposal, to determine if the results of that testing exceed the 5.0 mg/L hazardous waste threshold as governed under the Federal EPA "Resource Conservation and Recovery Act" (RCRA - 40 CFR Part 261).

Appendices:

APPENDIX A: HBMA Limitations

APPENDIX B: Inspector's Certification

APPENDIX C: Suspect Asbestos Containing Materials Inventory Table

APPENDIX D: Asbestos Laboratory Report

APPENDIX E: Summary of Lead Paint Materials Table

APPENDIX F: Lead Paint Samples Laboratory Report

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Schematic Design Submission Checklist MSBA Accelerated Repair Program



District: Melrose Public Schools

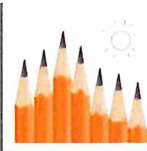
School: Horace Mann Elementary School

Scope: Roof Replacement

Schematic Design Deliverables:

OPM	District	
☒	☒	Project Narrative: - Existing conditions analysis (hazardous materials, structural, etc.) - Explanation of proposed solution - Designer statement that the proposed solution meets the Massachusetts Stretch Energy Code and/or the International Energy Conservation Code
☒	☒	Code Analysis
☒	☒	Schematic Design Drawings
☒	☒	Cost Estimate (CSI Format) - Include all Proposed Alternates
☒	☒	Form 3011 – Total Project Budget
☒	☒	Project Cash Flow (cumulative line chart illustrating Total Project Budget)
☒	☒	Project Schedule (Gantt Chart)
☒	☒	Accelerated Repair Program Reimbursement Rate Certification signed by the District
☒	☒	Proposed project scope and budget vote language in compliance with MSBA standard vote language

Schematic Design Submission Checklist MSBA Accelerated Repair Program



Program Guidelines and Project Funding Agreement:

OPM	District	
☒	☒	MSBA Board of Directors authorization to execute a Project Funding Agreement is tied to the specific project scope and budget presented in the Schematic Design.
☒	☒	The portion of the Construction Contingency potentially eligible for reimbursement is set at 5% of the total estimated eligible construction costs as included in the PFA's Total Project Budget and is intended for hard costs only. The MSBA will complete one Change Order review per district in which the MSBA will review Change Orders for eligibility not validity. All ineligible costs will not be reimbursed.
☒	☒	The portion of the Owner's Contingency potentially eligible for reimbursement is set at 0.5% of the total estimated eligible construction costs as included in the PFA's Total Project Budget and is intended for soft costs only. All ineligible costs will not be reimbursed.
☒	☒	Prior to securing project funding, the district will draft proposed project scope and budget vote language in compliance with MSBA standard vote language and will provide the vote language to the MSBA for review and approval prior to taking the vote.
☒	☒	After bids have been received and actual construction costs are established, the district's potential Project Funding Agreement must be revised to reflect the actual construction costs in accordance with paragraph 2.3 of the Project Funding Agreement. If there are bid savings, the MSBA shares in the cost savings by reducing the maximum facilities grant to reflect reimbursable costs. If there is a bid overage, construction contingency is transferred to the construction budget to reflect the additional costs and is deemed ineligible. The transfer of construction contingency due to the bid overage results in a reduction to the maximum facilities grant.
☒	☒	MSBA's standardized Schedule of Values will be used by the district to ensure that all budget entries in the MSBA's ProPay system mirror the Total Project Budget Form 3011 following the PFA Bid Amendment. The MSBA will only reimburse eligible costs if they are entered to the correct cost codes in the Total Project Budget.
☒	☒	Budget Revision Requests will be submitted by the district in a timely manner to reflect changes to the Total Project Budget. After a Budget Revision Request is executed, the district will enter the Budget Revision Request into the ProPay system for approval by the MSBA.

Schematic Design Submission Checklist MSBA Accelerated Repair Program



☒	☒	MSBA's Audit Department will review requests for reimbursement in the ProPay system of \$50,000 or more. All reimbursement requests which are less than \$50,000 will be returned to the district without review. All districts are encouraged to attend ProPay training conducted by the Audit Department following the execution of a Project Funding Agreement.
☒	☒	OPM monthly reporting begins when the OPM contract is executed and continues until the project receives Board of Directors approval of the final audit. Failure to submit timely and complete reports may impact district reimbursement review and payment. OPM monthly reporting supports MSBA review of reimbursement requests.

I certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that I have fulfilled all requirements described in Section 8.2 of the MSBA Standard Contract for Project Management Services (Accelerated Repair Program) by submitting the listed deliverables by the established deadline to the MSBA. I further certify, as evidenced by the boxes set forth under the heading, "Program Guidelines and Project Funding Agreement," which I have checked above, that I have explained the Program Guidelines and Project Funding Agreement to the district.

I understand that if a conflict is created between this form and the Project Funding Agreement, the Project Funding Agreement is the controlling document. I also understand that if a conflict is created between this form and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program), the MSBA Standard Contract is the controlling document. I further recognize that the purpose of this form is to further understand the Project Funding Agreement and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program).

Title: Project Director, Owner's Project Manager
Firm: The Vertex Companies, LLC
Date: June 27, 2022

I certify, as evidenced by the boxes set forth under the heading, "Program Guidelines and Project Funding Agreement," which I have checked above, that I have read and understand the Program Guidelines and Project Funding Agreement. I certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that I have reviewed the enumerated deliverables within the Schematic Design Submittal with the Owner's Project Manager and Designer. I further

Schematic Design Submission Checklist MSBA Accelerated Repair Program



certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that the OPM has explained to me the OPM's responsibilities as described in Section 8.2 of the MSBA Standard Contract for Project Management Services (Accelerated Repair Program) to submit the designer's deliverables listed above.

I understand that if a conflict is created between this form and the Project Funding Agreement, the Project Funding Agreement is the controlling document. I also understand that if a conflict is created between this form and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program), the MSBA Standard Contract is the controlling document. I further recognize that the purpose of this form is to further understand the Project Funding Agreement and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program).

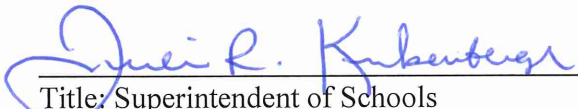

Title: Superintendent of Schools
Date: June 27, 2022

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Tighe&Bond

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1.3.3	HVAC Systems.....	1-5
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1.4	ARP Sustainability Requirements	1-5

Appendices

A	Code Analysis
B	Schematic Design Drawings `
C	Cost Estimate
D	Form 3011 – Total Project Budget
E	Project Cash Flow
F	Project Schedule
G	ARP Reimbursement Rate Certification and Checklist
H	Proposed Project Scope and Budget Vote Language
I	Hazardous Materials Assessment Report
J	Roof Sampling Test Cut Report

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

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Section 1

Project Narrative

1.1 Introduction

The City of Melrose is currently participating in the Massachusetts School Building Authority (MSBA) Accelerated Repair Program (ARP) and has submitted a Statement of Interest for repairs at the Horace Mann Elementary School. The Vertex Companies, LLC. and Tighe & Bond Designer Services, Inc. were subsequently designated as the Owner's Project Manager (OPM) and Designer, respectively for the proposed project.

The Horace Mann Elementary School is located at 40 Damon Avenue in Melrose, MA. The school building is a two-story brick masonry building with an approximate roof area of 14,000 square feet, which was constructed in 1949 with an addition constructed in 1955. The school has undergone several renovations over time, including accessibility and interior improvements in 2017. The first floor of the school generally consists of classrooms, a library, administrative and nurse offices, storage rooms, a multipurpose room, and bathrooms. The second floor contains classrooms and bathrooms. The school currently serves approximately 270 students from kindergarten to fifth grade.

The team assembled for execution of the Herbert Clark Hoover School project includes the following members:

- | | |
|----------------------------------|---|
| • Funding Agency | Massachusetts School Building Authority |
| • Owner | Melrose Public Schools |
| • OPM | The Vertex Companies, LLC |
| • Designer | Tighe & Bond, Inc. |
| • Cost Estimating | Ellana Construction Consultants. |
| • Hazardous Materials Assessment | Tighe & Bond, Inc. |
| • Code Review | Tighe & Bond, Inc. |
| • Structural/Construction Admin | Frawley Engineering, P.C. |

1.2 Existing Conditions

1.2.1 Roof

The existing thermoplastic polyolefin (TPO) membrane roof system does not appear to be original to the original building constructed in 1949. The addition constructed in 1955 also consists of a TPO membrane roof system. Based on documents provided by the District, the original roof on the portion of the building constructed in 1949 consisted of 5 ply coal tar pitch and gravel over 2.5" insulation on a steel roof deck. The original roof on the portion of the building constructed in 1955 consisted of a bonded membrane roof over 2.5" insulation on a steel deck. Based on recent site visits and field investigation, the entire roof area currently consists of a fully-adhered TPO membrane roofing system, with 3" rigid insulation and tar paper underlayment.

There is significant evidence of water damage inside the building from roof leaks and numerous deficiencies in the roofing membrane. The roof does not provide adequate thermal performance and drainage. Based on the site observations and investigation, the existing roofing system and majority of associated appurtenances appear to be in poor condition and are beyond their useful life.



**Photo 1: Existing Roof over
1949 Building**



**Photo 2: Existing Roof over
1955 Addition**

1.2.2 Plumbing

There are existing roof drains that are tied into the storm drainage system in the building. The drains appear to be in working order, however some are rusted and in poor condition.

Plumbing vents penetrate the roof in multiple locations to provide pressure relief for the school's sanitary piping system. The vent piping is in good condition with expected rust on the pipe interior.



Photo 3: Existing Roof Drains

1.2.3 HVAC

There are four exhaust fans (EFs) installed on the existing roof. Most of the existing fans' nametags are unreadable, therefore the age of the fans can't be determined. The fans appear to be in good condition and should be retained.



**Photo 4: Exhaust Fan
on 1949 Roof**



**Photo 5: Equipment and Chimney
on 1955 Building Addition**

1.2.4 Electrical

The existing electrical items on the roof are limited to electrical connections to any HVAC equipment requiring electrical power. It is assumed that each HVAC fan has an integral or equipment-mounted disconnect.

1.3 Recommended Solutions

1.3.1 Roof Replacement

Replacement of the existing roof system at the Horace Mann School is recommended for improving thermal performance, roof drainage, overall energy efficiency of the building, and remedying numerous roof leaks. The following items below outline the proposed scope of work for the project, including demolition. Schematic Design plans with additional detail are included in Appendix B.

Roof Demolition will include:

- Removal of the existing TPO membrane roofing system
- Removal of the existing rigid insulation and fiberboard
- Removal of the existing access hatch
- Repair of the steel roof deck as needed
- Removal and storage of existing HVAC equipment
- Removal of existing fascia, damaged curbing, blocking, and flashing

Proposed Roof Improvements will include:

- Repair of any damaged or compromised steel roof decking discovered during demolition
- Installation of a fully-adhered EPDM roofing system. The new roofing system will include, from bottom to top:
 - Fiberglass-reinforced gypsum sheathing cover board
 - Base sheet/ combination air and vapor barrier
 - New polyisocyanurate rigid insulation. The new insulation will meet MSBA Accelerated Repair Program Requirements, including the stretch energy code. Insulation thickness will provide a minimum R-value of 30. Tapered insulation will be installed to provide a positive pitch toward roof drains.
 - ½" coverboard installed over the insulation
 - Fully-adhered EPDM roofing membrane
- Installation of new curbing, flashing, blocking, metal fascia, and roof drains
- Installation of new access hatches, ladders, and protective guardrails

1.3.2 Plumbing Systems

Plumbing Demolition will include:

- Removal of all existing roof drains. Existing rain leaders within building will be cut and capped away from the drain body and prepared for reconnection.

Proposed Plumbing Improvements will include:

- Installation of new roof drains and associated piping. All new roof drains will be replaced in kind.
- Installation of 1" thick insulation on drain bodies and new drainage piping.
- Inspection of existing drainage piping, including snaking the pipes to check for clogs and jetting the pipes should there be any clogs present.

- Extension of vent piping as required to maintain clearance above roof of 18-24".

1.3.3 HVAC Systems

HVAC Demolition will include:

- Disconnection, removal, and storage of all exhaust fans
- Removal and disposal of roof curbs on original building's roof.
- Prior to unit removal, exhaust fans will be tested and airflows recorded for final balancing efforts.
- Installation of temporary caps for all ductwork.
- Installation of temporary caps over curbs on newer building's roof.

HVAC Improvements will include:

- Installing new curbs for exhaust fans on older roof; including new transition curbs as required for fan connection to the existing roof opening.
- Repairing curbs and/or blocking with minor damage and extending existing curbs as required. Provision of adapter curbs as required for fan re-installation
- Reinstallation of retained exhaust fans
- Reconnecting and sealing units to existing ductwork.
- Reconnecting units to existing controls.
- Re-testing and balancing systems to match pre-existing airflows.

1.3.4 Electrical Systems

The proposed electrical work will include:

- Disconnecting and making safe all existing electrical devices with connections to mechanical equipment. Once the existing equipment is placed back in its permanent location after roofing, the electrical connections will be re-energized. For any equipment that has moved, the existing conduit and wires will be extended as required.

1.4 ARP Sustainability Requirements

MSBA's ARP requires use of the Stretch Energy Code (780 CMR – Appendix AA and 2015 IECC) as the basis of design for ARP projects for roof replacement. Below is a table comparison of the required code values for the relevant project items and the values for the proposed assemblies. The proposed solutions and items for the Herbert Clark Hoover School meet or exceed the ARP sustainability requirements.

Roofs	Maximum U-Value (Btu/hr·ft ² ·°F)	Minimum R-Value (°F·ft ² ·hr/Btu)
Required	0.032	30
Proposed	0.032	30

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Horace Mann School Repairs Project

Building Code Analysis

This analysis summarizes codes requirements applicable to the project scope for the Horace Mann School Repairs Project. This summary includes general code information applicable to the overall project and more specific requirements related to roof replacement activities.

Applicable codes for this project include:

- International Building Code 2015 (IBC)
- International Existing Building Code 2015 (IEBC)
- International Energy Conservation Code 2018 (IECC)
- 248 CMR 10.00 Uniform State Plumbing Code (2017)
- Commonwealth of Massachusetts State Building Code, Ninth edition 780 CMR (including amendments to the IBC, IECC and IEBC)
- Massachusetts Stretch Energy Code 780 Appendix AA
- Architectural Access Board Regulations 521 CMR (AAB)
- American Society of Civil Engineers – Minimum Design Loads for Buildings and Other Structures (ASCE 7-05)
- National Electrical Code NFPA 70

Section 1 – General Code

Use and Occupancy Classification (305 IBC 2015 & 780 CMR)

- Educational (E)
 - Due to the anticipated scope of work, roof replacement, Level 1 alterations of the IEBC will be triggered. Level 1 alterations encompass the removal and replacement of materials that serve the same purpose. Any new elements must comply with the requirements for new construction.

Types of Construction (602 IBC 2015 & 780 CMR)

- Type III Construction – Construction is that type of construction in which the exterior walls are of noncombustible materials and the interior building elements are of any material permitted by this code. Fire-retardant-treated wood framing complying with Section 2303.2 shall be permitted within exterior wall assemblies of a 2-hour rating or less.

Alterations Level 1 (503 IEBC 2015 & 780 CMR)

- Removal and replacement or the covering of existing materials, elements, or fixtures using new materials, elements, equipment, or fixtures that serve the same purpose.

Material and Methods (702.6 & Chapter 8 IEBC 2015 & 780 CMR)

- All new work shall comply with materials and methods requirements in the IBC, IEBC, IECC, IMC, and MSPC, as applicable that specify material standards, details of installation and connection, joints, penetrations, and continuity of any element, component, or system in the building.

Section 2 – Requirements Applicable to Roof Replacement Work**Building Envelope Requirements (IECC 2015, Table C402.3)**

- Roof Maximum U-Factors
 - Insulation entirely above deck – U-0.032
- Roof Minimum R-Values
 - Insulation entirely above deck – R-30ci

Massachusetts State Building Code (780 CMR Amendments)

- Dead loads on an existing roof may not increase by more than 5% due to a re-roofing project.
- If the additional dead loads exceed 5%, the structure must conform to current snow load requirements.
- Since a similar EPDM roofing system (and ballast in some locations) is being removed from the roof prior to roof replacement, the new built-up roof is not anticipated to increase the dead load on the roof by more than 5%.

Code of Federal Regulations Title 29 (29 CFR)

- Holes – each employee on walking/working surfaces shall be protected from falling through holes more than 6 feet above lower levels, by personal fall-arrest systems, covers, or guardrail systems erected around such holes.

Uniform State Plumbing Code 248 CMR 10.00

- Storm Drain leaders are sized based on roof area served. The original roof area and the addition roof area are 9900sqft and 3600sqft respectively and include three (3) 4" roof drains each. A 4" roof drain can capture storm water from 4600sqft of roof area per 248 CMR 10.0. The roof drain sizes installed suffice for the school's roof. The new roof drains will use the same outlet size as the existing ones.

Section 4 – Accessibility Requirements**Existing Building (3.3 MAAB 521 CMR)**

- Requirements for an accessible entry, toilet, drinking fountain, and telephone (if pay phones are provided) will be triggered based on the estimated cost of the project. A proponent is required to provide these items if the cost of a renovation project exceeds \$500,000.

Building Code Analysis**Tighe&Bond**

- If the work costs less than \$100,000, then only the work being performed is required to comply with 521 CMR.
- Exception: Whether performed alone or in combination with each other, the following types of alterations are not subject to 521 CMR 3.3.1, unless the cost of work exceeds \$500,000 or unless work is being performed on the entrance or toilet room.
 - Curb cuts
 - Alteration work which is limited solely to electrical mechanical, or plumbing systems; to abatement of hazardous materials; or retrofit of automatic sprinklers and does not involve the alteration of any elements or spaces required to be accessible under 521 CMR. Where electrical outlets and controls are altered, they must comply with 521 CMR
 - Roof repair or replacement, window repair or replacement, repointing and masonry repair work
 - Work related to septic system repairs, site utilities and landscaping.
- If the cost of the project, and any additional renovations completed within 36 months of the project, exceeds 30% +of the full and fair cash value of the building, the entire building must be upgraded as required to meet 521 CMR requirements.
- The building currently complies with ADA/AAB requirements and accessibility upgrades will not be required as part of this project.

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Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

HORACE MANN ELEMENTARY SCHOOL

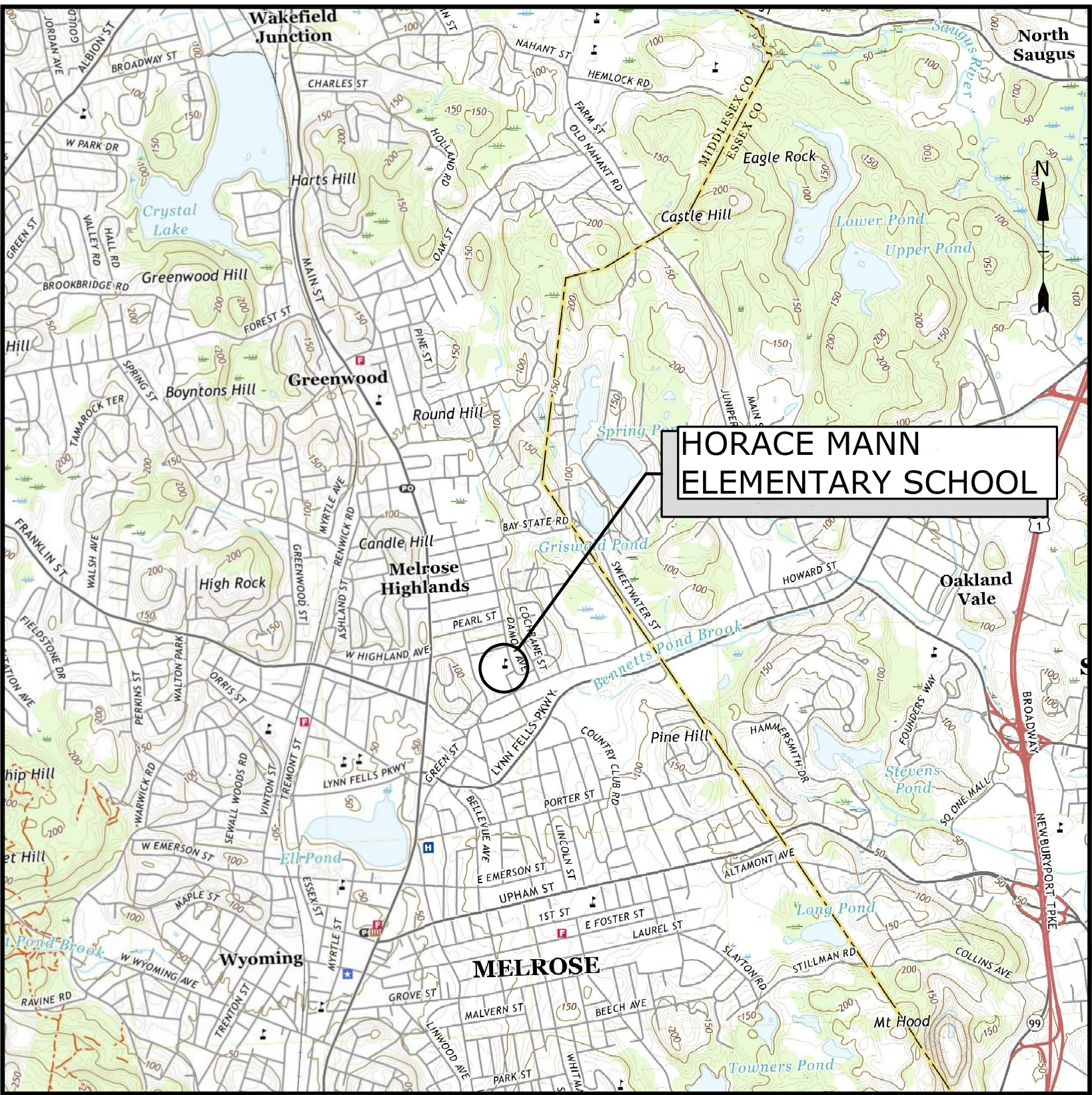
MSBA ACCELERATED REPAIR PROGRAM

ROOF REPLACEMENT PROJECT

MELROSE, MASSACHUSETTS

JUNE 2022

LIST OF DRAWINGS	
	COVER
G-001	ROOF PHOTOGRAPHS
AD-101	ROOF DEMOLITION PLAN
A-101	ROOF REPLACEMENT PLAN
A-501	ROOF DETAILS - 1
A-502	ROOF DETAILS - 2
P-101	PLUMBING ROOF PLAN
H-101	HVAC ROOF PLAN
E-101	ELECTRICAL ROOF PLAN



LOCATION MAP
SCALE: 1" = 2000'

PROJECT TEAM:

OWNER
CITY OF MELROSE
562 MAIN STREET
MELROSE, MA 02176

OWNER'S PROJECT MANAGER
THE VERTEX COMPANIES, INC.
400 LIBBEY PARKWAY
WEYMOUTH, MA 02189

COST ESTIMATING
ELLANA, INC.
98 NORTH WASHINGTON STREET
SUITE 109
BOSTON, MA 02114

FUNDING
MASSACHUSETTS SCHOOL
BUILDING AUTHORITY
40 BROAD STREET, SUITE 500
BOSTON, MA 02109

ENGINEER
TIGHE & BOND
DESIGNER SERVICES, INC.
53 SOUTHAMPTON ROAD
WESTFIELD, MA 01085

PREPARED BY:
Tighe&Bond

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NOT FOR CONSTRUCTION
COMPLETE SET 9 SHEETS

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Horace Mann
Elementary
School Roof
Replacement
Project

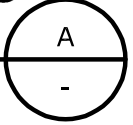
City Of Melrose

Melrose,
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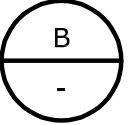
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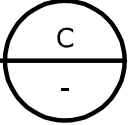
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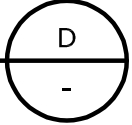
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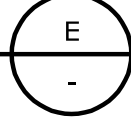
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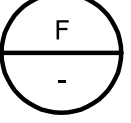
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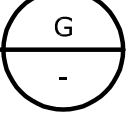
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BUILDING AND 1955 ADDITION
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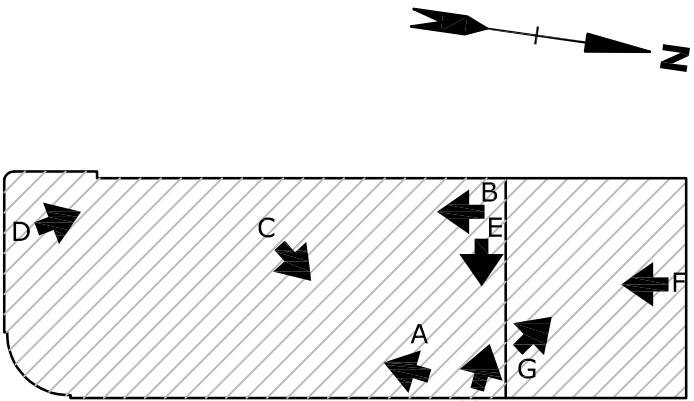
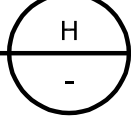
CHIMNEY AND EQUIPMENT ON
1955 ADDITION
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ROOF DRAINS ON 1955
ADDITION
NO SCALE



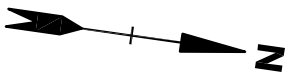
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HORACE MANN KEYPLAN
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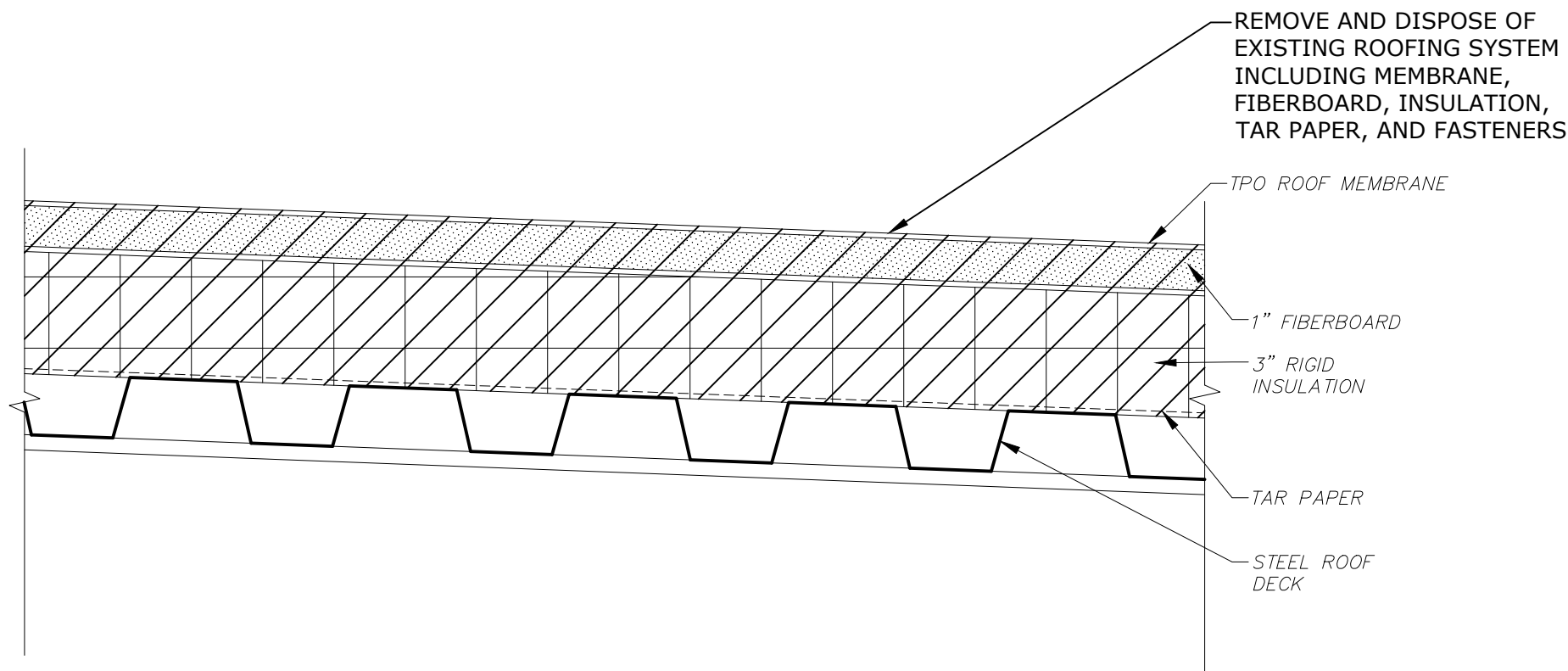


Horace Mann Elementary School Roof Replacement Project

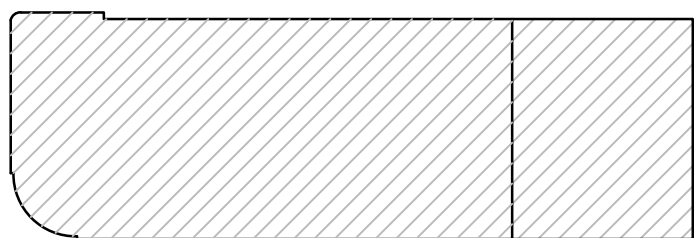
Melrose,
Massachusetts

ROOF DEMOLITION PLAN

AD-101



DETAIL	1
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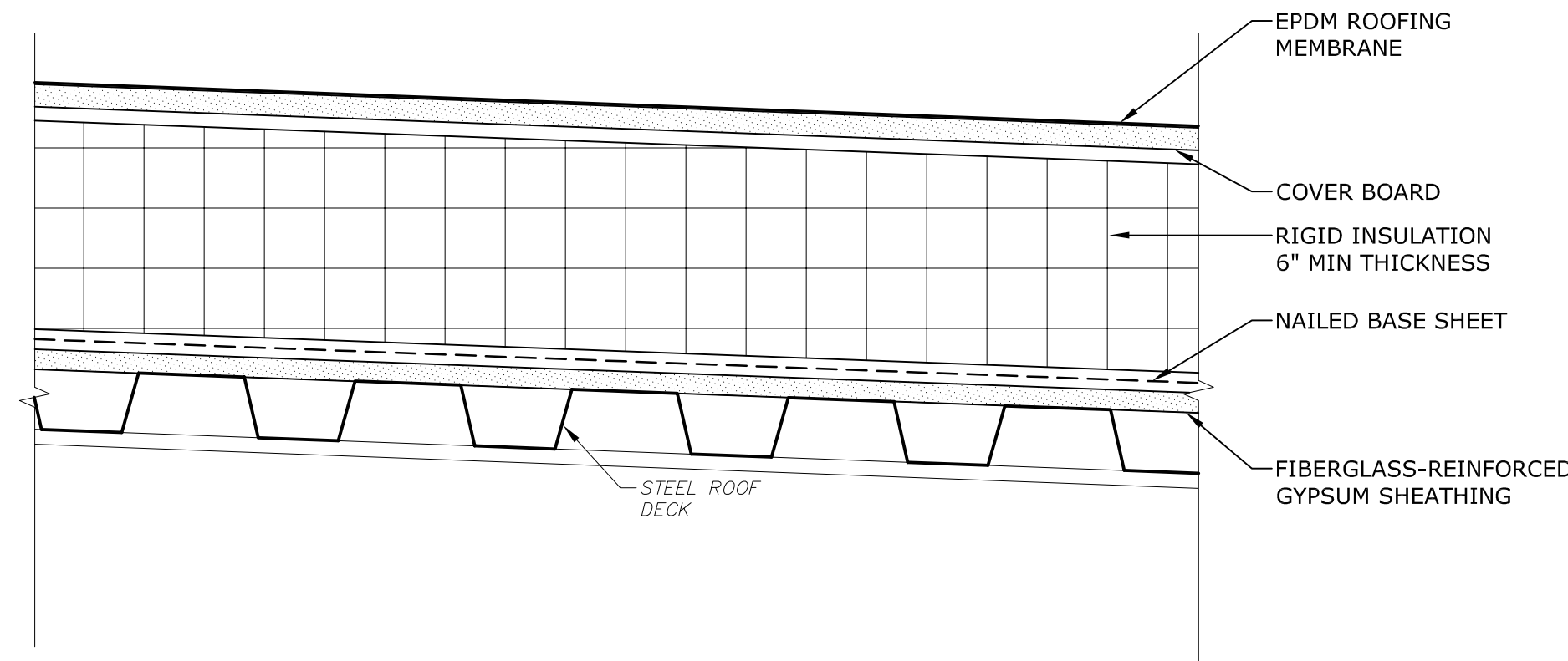
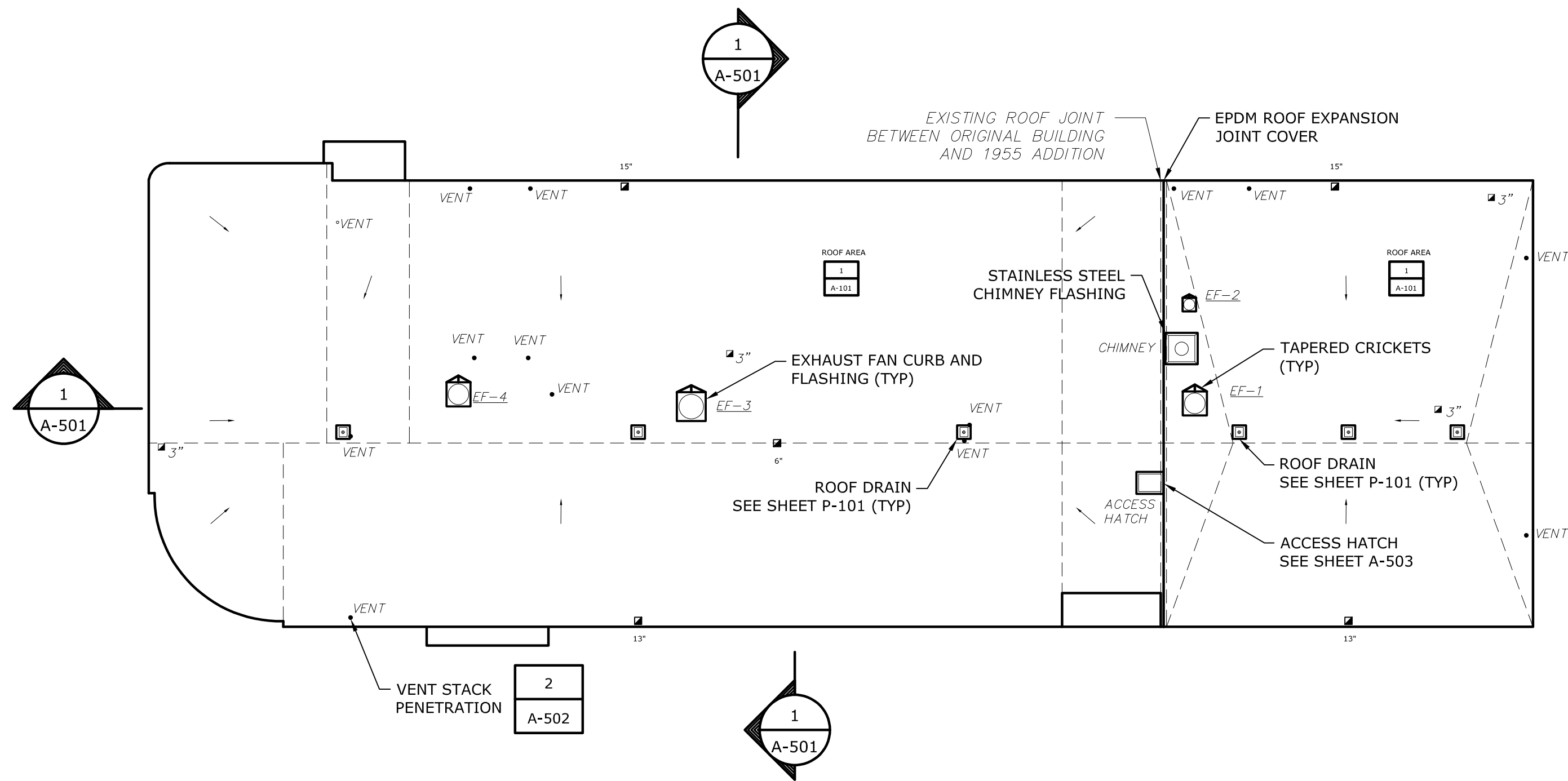
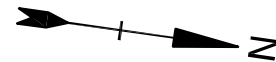


0 8' 16' 32'

SCALE: 1/16" = 1'-0"

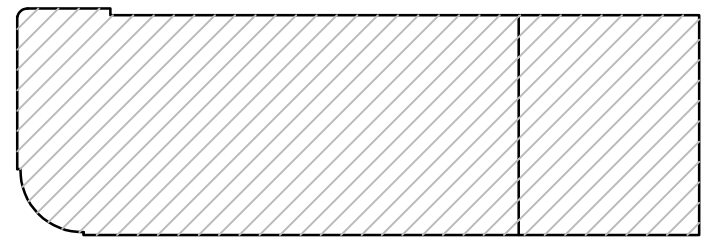
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	EXISTING VENT PIPE PENETRATION		EXISTING EXHAUST CAP OR AIR INTAKE
	EXISTING ROOFTOP EXHAUST FAN/DUCT WITH CURB		EXISTING CAPPED CURB
	EXISTING ROOFTOP EQUIPMENT ON SLEEPERS		EXISTING INSULATION THICKNESS TEST CUT
— G —	GAS PIPE ON PIPE SUPPORT	---	EXISTING CANOPY LINE
		---	EXISTING ROOF SLOPE LINE
			ITEM TO BE REMOVED/DEMOLISHED

1. REMOVE AND DISPOSE OF ALL EXISTING HVAC EQUIPMENT CURBS.
2. SEE SHEET H-101 FOR HVAC EQUIPMENT REQUIREMENTS.

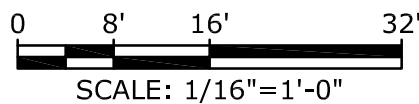


TYPICAL PROPOSED ROOF SECTION

DETAIL	1
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HORACE MANN KEYPLAN
NO SCALE



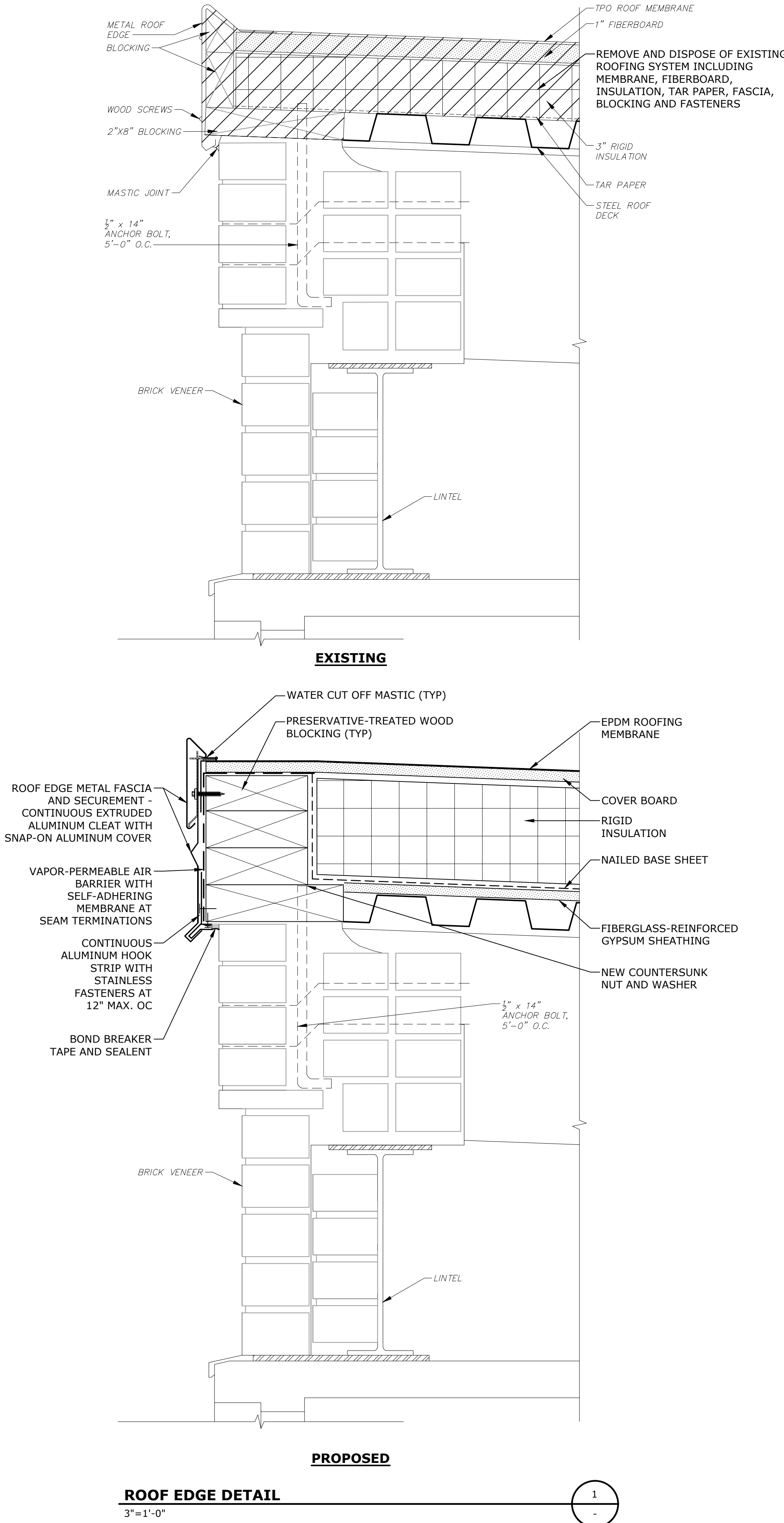
LEGEND

- | | | | |
|---|------------------------------------|---|----------------------------------|
|  | ROOF DRAIN |  | GOOSENECK (INTAKE OR EXHAUST) |
|  | VENT PIPE PENETRATION |  | EXHAUST CAP OR AIR INTAKE |
|  | ROOFTOP EXHAUST FAN/DUCT WITH CURB |  | APPROXIMATE INSULATION THICKNESS |
|  | ROOFTOP EQUIPMENT ON SLEEPERS |  | ROOF SLOPE LINE |
|  | GAS PIPE ON PIPE SUPPORT |  | GUARDRAIL FOR FALL PROTECTION |
| | |  | WALKPAD |
| | |  | ROOF SLOPE DIRECTION |

NOTES:

1. INSTALL NEW CURBING FOR ALL HVAC EQUIPMENT. NEW CURBS MUST BE MINIMUM 12" ABOVE NEW ROOFING. INSTALL NEW CRICKETS TO ENSURE PROPER DRAINAGE AT ALL ROOF CURBS.
2. ADJUST ELEVATION OF ROOF EDGES TO MATCH THE MAXIMUM INSULATION THICKNESS AT EACH ROOF DECK ELEVATION TO PROVIDE A LEVEL ROOF PERIMETER
3. ROOF SLOPE TO BE 1/4" PER FOOT MINIMUM UNLESS NOTED OTHERWISE.
4. FOR SMALL-DIAMETER HVAC PENETRATIONS SEE DETAIL 2/A-502.

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SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

Melrose,
Massachusetts

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DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - A-501.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		

ROOF DETAILS - 1

SCALE: AS SHOWN

A-501

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

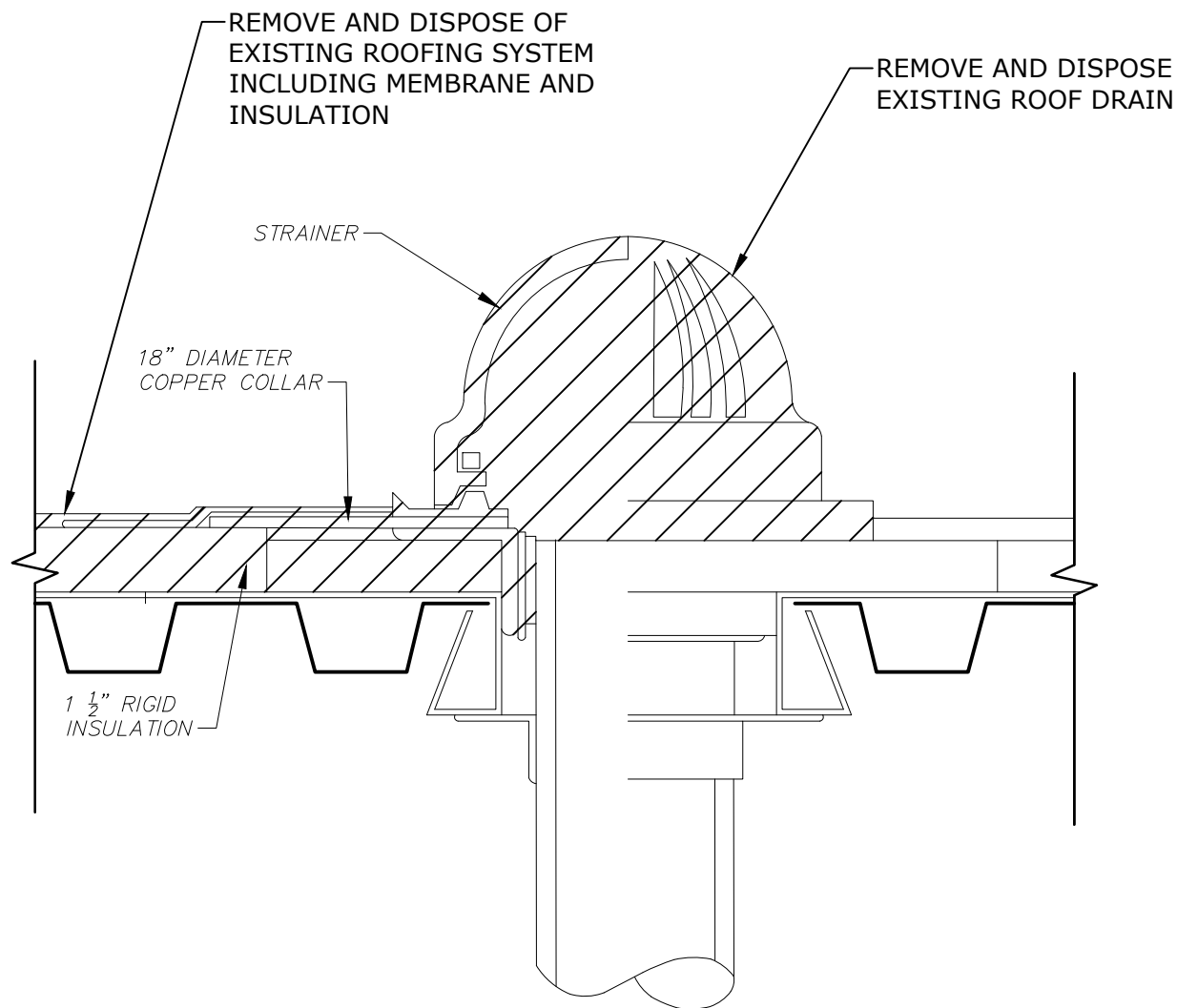
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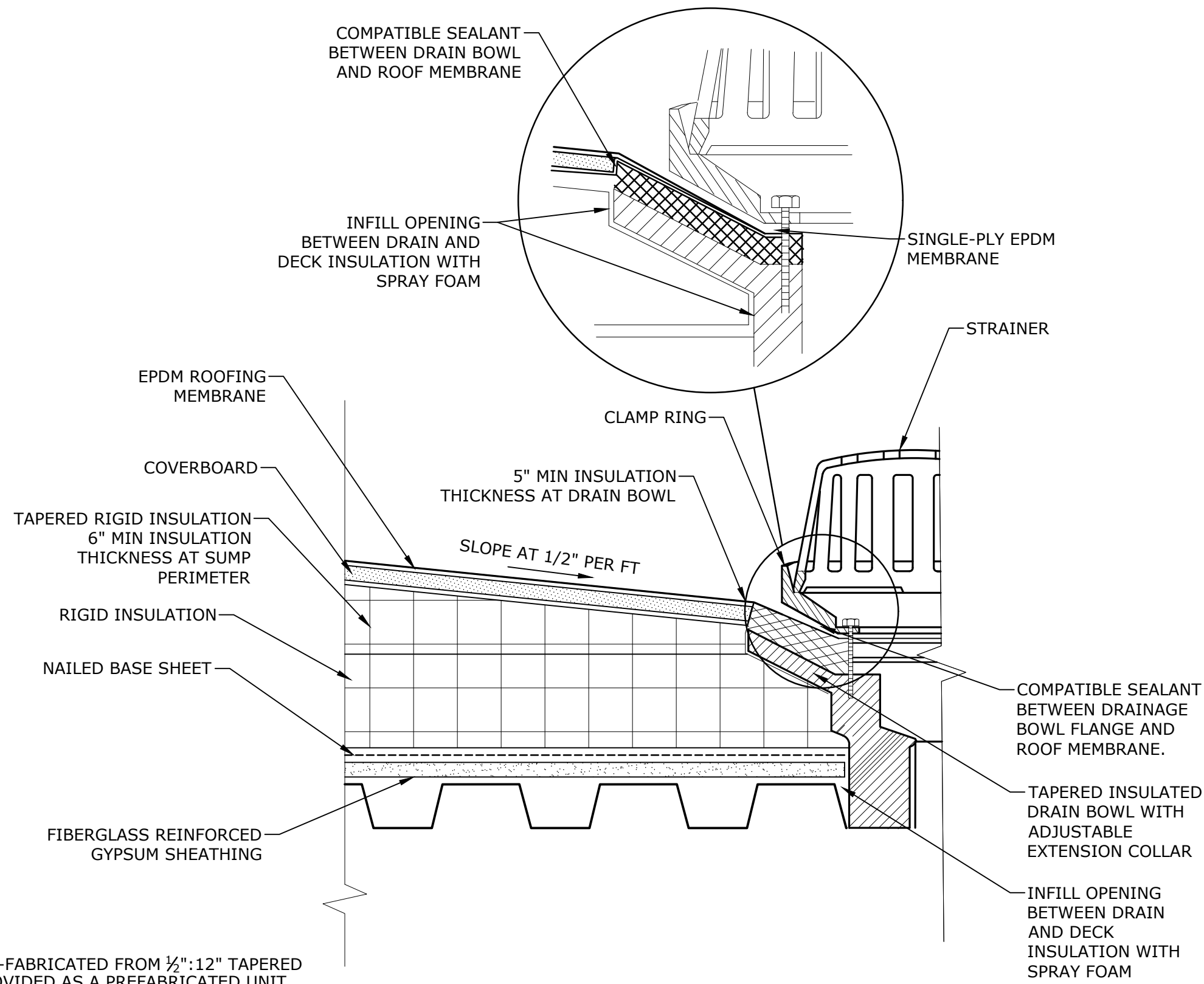
ROOF DETAILS - 2

SCALE: AS SHOWN

A-502



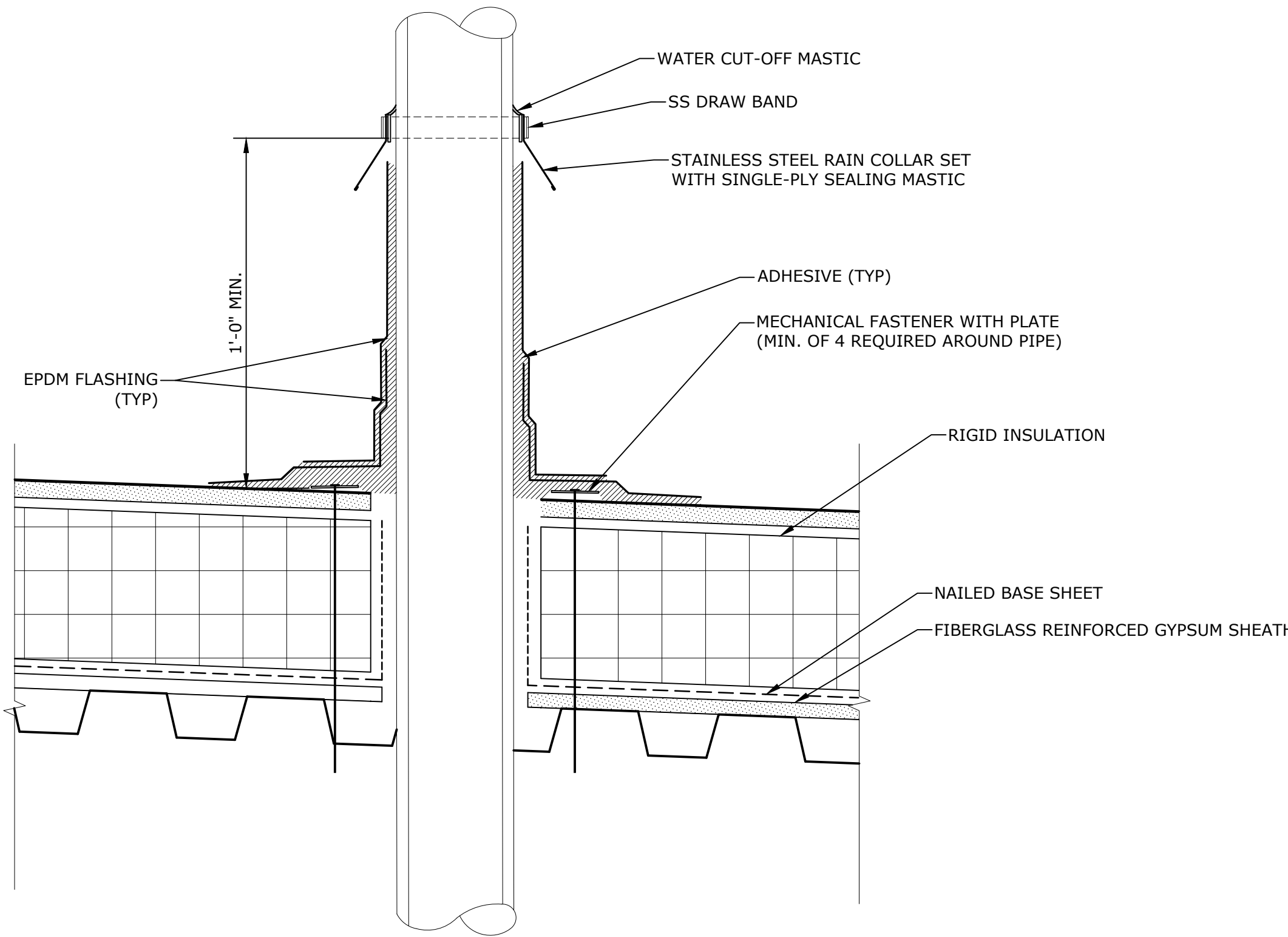
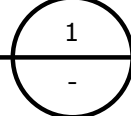
EXISTING



PROPOSED

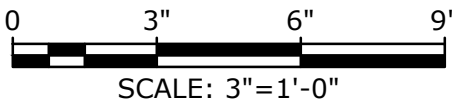
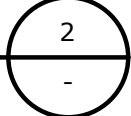
ROOF DRAIN DETAIL

3"=1'-0"



VENT STACK DETAIL

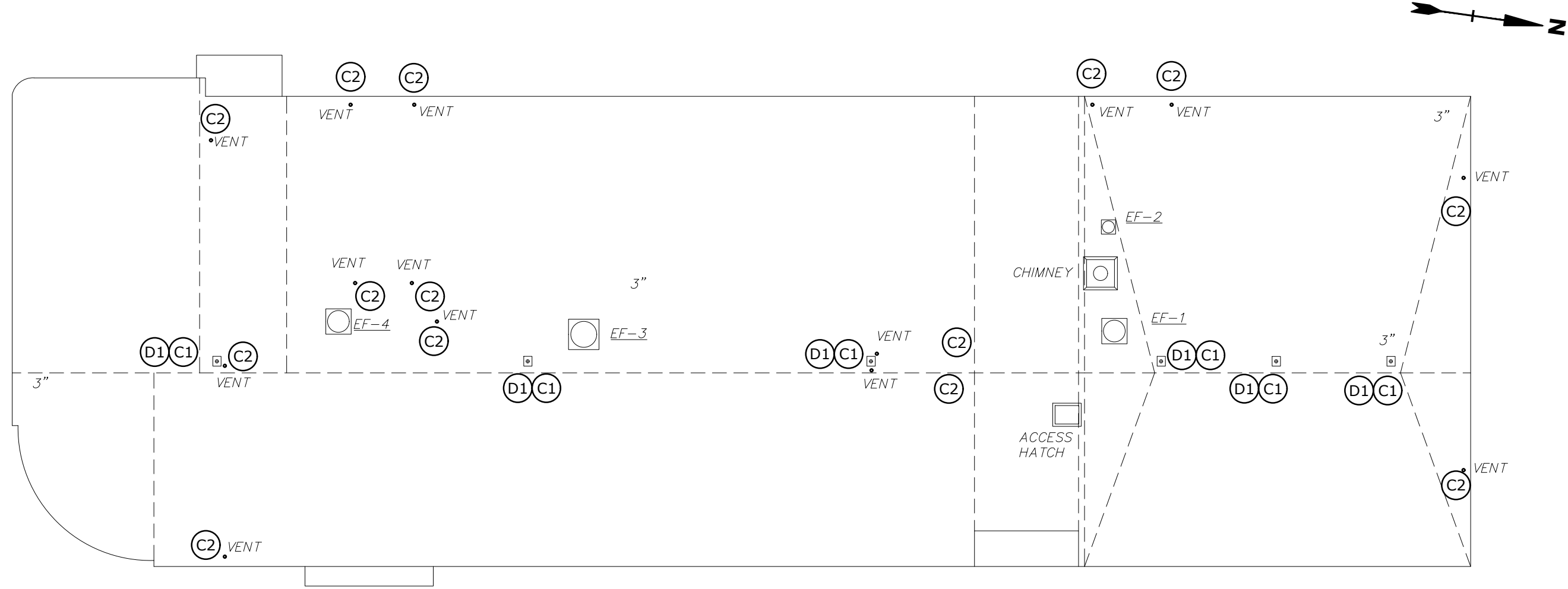
3"=1'-0"



NOTES

1. SUMP MAY BE FIELD-FABRICATED FROM ½":12" TAPERED INSULATION OR PROVIDED AS A PREFABRICATED UNIT.

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PLUMBING ROOF DEMOLITION PLAN
1/16" = 1'-0"

- LEGEND**
- ACCESS HATCH
 - ROOF DRAIN
 - VENT PIPE PENETRATION

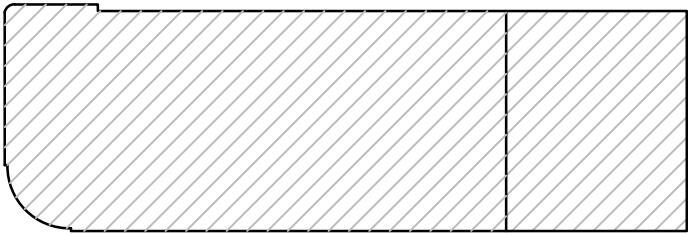
DEMOLITION KEY NOTES:

D1 REMOVE EXISTING ROOF DRAINS. CUT AND CAP EXISTING DRAIN PIPING AWAY FROM DRAIN BODY WITHIN BUILDING. PREPARE FOR FUTURE CONNECTION. COORDINATE EXTENT OF DEMOLITION W/ ROOFING CONTRACTOR TO CONFIRM ADEQUATE CLEARANCE FOR NEW ROOFING INSTALLATION IS PROVIDED.

CONSTRUCTION KEY NOTES:

C1 NEW ROOF DRAIN. DRAIN TO MATCH OUTLET SIZE OF 4". CONNECT NEW PIPE TO EXISTING STORM DRAINAGE SYSTEM WITHIN THE BUILDING. INSULATE RD SUMP AND NEW SECTION OF STORM DRAIN PIPING WITH 1-INCH FIBERGLASS INSULATION WITH ASJ. INSULATION THERMAL CONDUCTIVITY TO BE 0.21-0.27 BTU-IN/(h-ft²-°F). VERIFY TIE-IN LOCATION IN FIELD. COORDINATE WITH ROOFING CONTRACTOR AND GC.

C2 CONFIRM VENT SIZE IN FIELD. EXTEND VENT PIPE WITH SAME SIZE TO TERMINATE 24" ABOVE NEW ROOF.



HORACE MANN KEYPLAN
NO SCALE

0 8' 16' 32'
SCALE: 1/16"=1'-0"

**SCHEMATIC DESIGN
NOT FOR CONSTRUCTION**

**Horace Mann
Elementary
School Roof
Replacement
Project**

City Of Melrose

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - P-101.dwg		
DRAWN BY: PL, JM		
CHECKED: MPW		
APPROVED: FJH, JPV		

PLUMBING ROOF PLAN

SCALE: AS SHOWN

P-101

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

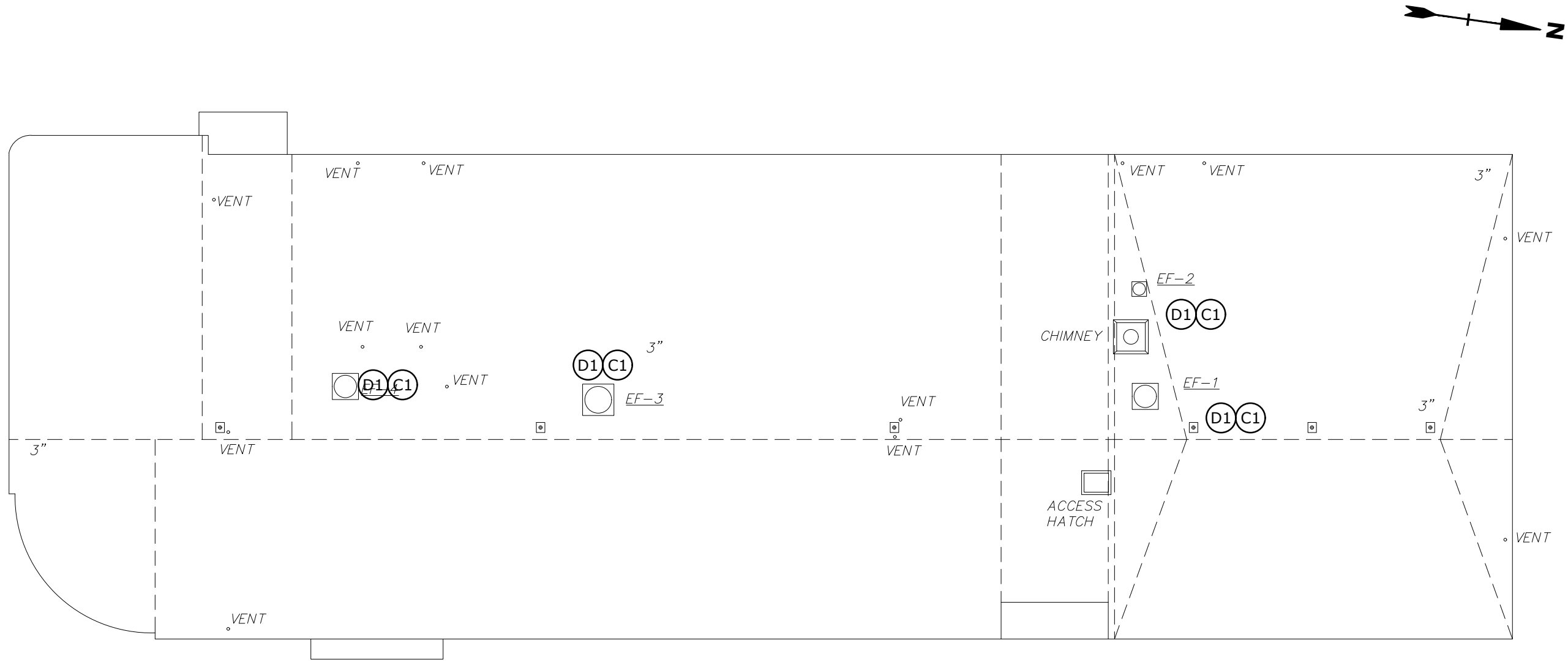
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - H-101.dwg		
DRAWN BY: PL, JM		
CHECKED: MPW		
APPROVED: FJH, JPV		

HVAC ROOF PLAN

SCALE: AS SHOWN

H-101



LEGEND

- ACCESS HATCH
- EXHAUST FAN

GENERAL NOTES

- VERIFY ALL EXISTING CONDITIONS AND DIMENSIONS PRIOR TO COMMENCEMENT OF WORK. COORDINATE ALL WORK WITH OTHER TRADES.
- THE DRAWINGS ARE DIAGRAMMATIC AND INDICATE THE GENERAL ARRANGEMENT OF SYSTEMS AND WORK INCLUDED IN THE CONTRACT.
- INSTALL EQUIPMENT AND SUPPORTS IN ACCORDANCE WITH ALL RELEVANT BUILDING CODES.
- FIELD VERIFY QUANTITY OF MECHANICAL EQUIPMENT, AND SUPPORTS TO BE REMOVED.
- PERFORM PRE-BALANCE TESTING OF ALL EXHAUST FANS PRIOR TO UNIT REMOVAL, RECORD AIRFLOWS FOR FINAL BALANCING EFFORTS. PROVIDE REPORT TO ENGINEER.
- PROVIDE TEMPORARY CAPS FOR ALL DUCTWORK. NO DUCTWORK SHALL REMAIN OPEN AT ANY TIME.
- DURING DEMOLITION, CONTROL WIRING IS TO BE DISCONNECTED AND PROTECTED FOR FUTURE USES/RECONNECTION.
- ALL MATERIALS, METHODS AND EQUIPMENT INSTALLED MUST BE IN COMPLIANCE WITH PROJECT SPECIFICATIONS AND APPLICABLE CODES.

GENERAL DEMOLITION NOTES

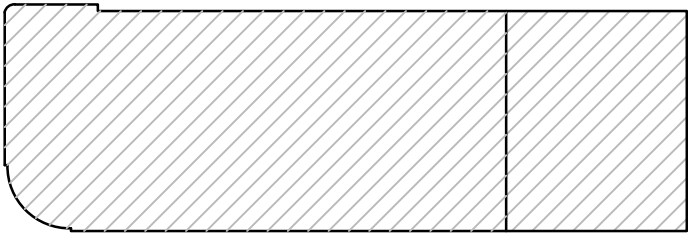
- IT IS NOT THE INTENT OF THESE DOCUMENTS TO SHOW EVERY DEVICE, APPURTENANCE, PIPE, WIRE, OR CONDUIT TO BE REMOVED. HVAC EQUIPMENT, UNITS, AND SYSTEMS NOT BEING REUSED SHALL BE REMOVED IN THEIR ENTIRETY INCLUDING ASSOCIATED SUPPORTS.
- PROPERLY DISPOSE OF DEMOLISHED EQUIPMENT IN COMPLIANCE WITH CODES, REGULATIONS, AND DEP STANDARDS. INVENTORY, SALVAGE AND TURN OVER OR DISPOSE OF EQUIPMENT AT DIRECTION OF OWNER.
- ALL EXISTING SYSTEMS SHALL BE MADE FULLY OPERATIONAL, INCLUDING RECONNECTION TO SERVICES AND DUCTWORK.
- EXISTING EQUIPMENT TO BE REMOVED AND RE-INSTALLED SHALL BE FIELD VERIFIED FOR QUANTITY AND CONDITION. KEEP AN ACCURATE RECORD OF STORED EQUIPMENT INCLUDING CONDITION.
- SYSTEMS REQUIRED TO REMAIN IN OPERATION DURING DEMOLITION SHALL BE CAREFULLY PROTECTED FROM DAMAGE AND CONTAMINATION BY THE CONSTRUCTION PROCESS.

DRAWING DEMOLITION NOTES:

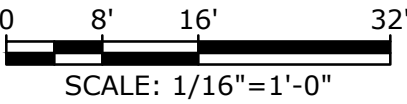
- (D1) DISCONNECT, REMOVE, AND STORE EXHAUST FAN. PROVIDE TEMPORARY CAP OVER DUCT OPENING. DEMOLISH ROOF CURB. MEASURE AIRFLOW OF FAN PRIOR TO UNIT REMOVAL.

DRAWING CONSTRUCTION NOTES:

- (C1) VERIFY ROOF OPENING AND FAN CURB-CAP DIMENSIONS. FURNISH NEW ROOF CURB WITH TRANSITION TO FAN AS REQUIRED (INSTALLED BY GC). CURB TO BE INSULATED AND A MINIMUM 12" ABOVE NEW ROOF. RE-INSTALL REMOVED FAN ON CURB, RECONNECT AND SEAL TO EXISTING DUCTWORK. CONNECT FAN TO EXISTING CONTROLS.



HORACE MANN KEYPLAN
NO SCALE



SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

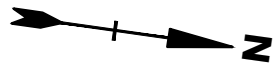
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - E-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: FJH, JPV		

ELECTRICAL ROOF PLAN

SCALE: AS SHOWN

E-101



GENERAL NOTES:

- DISCONNECT AND MAKE SAFE THE EXISTING MECHANICAL EQUIPMENT FOR REMOVAL BY HVAC CONTRACTOR. THE EXISTING FEEDER SHALL BE DE-ENERGIZED AND LOCKED OUT FOR THE DURATION OF THE NEW ROOF WORK. RECONNECT EXISTING FEEDER TO EXISTING MECHANICAL EQUIPMENT UPON THE RE-INSTALLATION BY HVAC CONTRACTOR. MODIFY AND EXTEND CONDUIT AND WIRE AS REQUIRED.
- ALL CONDUIT RUNS ACROSS ROOF SHALL BE REMOVED AND REINSTALLED UPON COMPLETION OF ROOF UNLESS CONDUITS AND WIRE HAVE BEEN ABANDONED IN WHICH CASE THEY SHALL BE REMOVED PERMANENTLY. ELECTRICAL CONTRACTOR SHALL FIELD VERIFY ALL EXISTING CIRCUITING TO ROOF TOP EQUIPMENT.
- COORDINATE ALL DEVICE LOCATIONS WITH GC AND/OR OWNER PRIOR TO COMMENCEMENT OF WORK.
- THE LOCATIONS OF EXISTING EQUIPMENT ARE APPROXIMATE. DETERMINE THE EXACT LOCATION OF STRUCTURES BEFORE COMMENCING WORK. BE FULLY RESPONSIBLE FOR ANY AND ALL DAMAGE WHICH MIGHT BE OCCASIONED BY FAILURE TO EXACTLY LOCATE AND PRESERVE ANY AND EQUIPMENT AND STRUCTURES.
- ALL PANELBOARDS SHOWN ARE LOCATED ON THE BASEMENT FLOOR.

DEMOLITION LEGEND

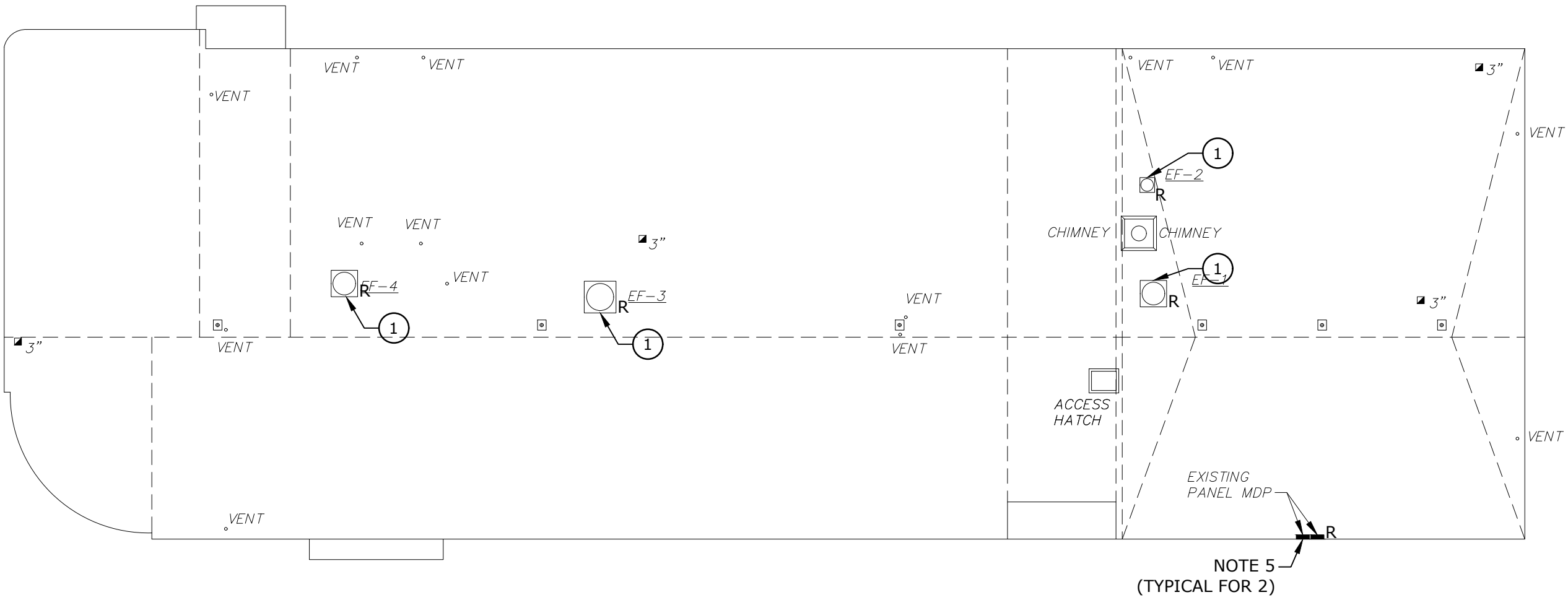
"R" EXISTING DEVICE TO REMAIN ACTIVE AS-IS. SEE GENERAL NOTES FOR ADDITIONAL INFORMATION.

POWER DISTRIBUTION EQUIPMENT

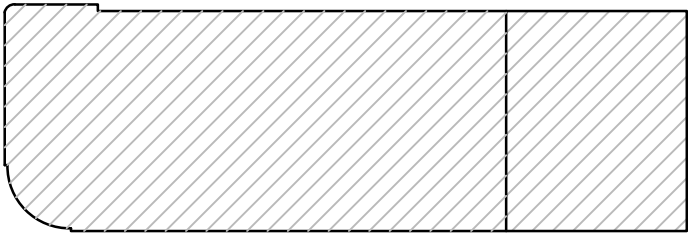
PANELBOARD, SURFACE MOUNTED

ELECTRICAL KEY NOTES:

- DISCONNECT EXISTING EQUIPMENT. SECURE CONDUCTORS AND MAKE SAFE FOR ROOF INSTALLATION. LOCK OUT TAG OUT CIRCUIT AT LOCAL OVERCURRENT PROTECTION DEVICE. RECONNECT TO REINSTALLED EQUIPMENT. SEE GENERAL NOTE 1. REFER TO HVAC DRAWINGS FOR DETAILS.



ELECTRICAL ROOF PLAN
1/16" = 1'0"



HORACE MANN KEYPLAN
NO SCALE

0 8' 16' 32'
SCALE: 1/16"=1'-0"

**MSBA Accelerated Repair Program
Horace Mann Elementary School
Hoover Elementary School
Roof Replacement project
Melrose, MA**

**Schematic Design Estimate
June 27, 2022**

Tighe & Bond



198 North Washington St, #109, Boston MA 02114



**MSBA Accelerated Repair Program
Roof Replacement project
Melrose, MA
Schematic Design Estimate
BASIS OF ESTIMATE**

6/27/2022

Roof Replacement project

DOCUMENTATION

This estimate was prepared from the following information:

Schematic Design Drawings provided by Tighe & Bond design team, dated June 20, 2022

BASIS FOR PRICING

This estimate reflects the current construction value for the construction of this project and should not be construed as a prediction of a low bid. Prices are based on local prevailing wage construction costs at the time the estimate was prepared.

PROJECT OUTLINE

The project consists of roof replacement at Horace Mann Elementary School and Hoover Elementary School in Melrose, MA.

QUALIFICATIONS

Owner costs and fees are excluded

ITEMS NOT CONSIDERED IN THIS ESTIMATE

Items not included in this estimate are:

Overtime outside industry standard

Work outside normal hours of operation

Preconstruction fees

Utility Company Charges or Hook-up fees have been excluded

No permits or special fees have been included

Third party commissioning costs.

Owner supplied and/or installed items (e.g.. Draperies, furniture and equipment)

Loose Furniture and Equipment

Owner Supplied and Installed Furniture, Fixtures and Equipment

Relocation / move costs

Air Quality monitoring / Vibration monitoring

Loose technology equipment (i.e. Computers, Printers, Etc.)

The estimate assumes all long-lead items can be pre-purchased to meet schedule requirements.

The estimate is based on the premise that the design will meet all codes, laws, ordinances, rules, and regulations in effect at the time that the estimate was prepared. The estimate shall be adjusted should any discrepancies between design

and the aforementioned codes, laws or ordinances result in, or require, an increase in the Cost 'of the Work

Items identified in the design as Not In Contract (NIC)

Builder's Risk insurance, terrorist insurance and other Owner insurances



Roof Replacement project

June 27, 2022

Horace Mann Elementary School

Melrose, MA

Schematic Design Estimate

		13,450 GSF		
			Cost / SF	
02 Existing Conditions		212,272	15.78	26.8%
05 Metals		5,380	0.40	0.7%
06 Wood, Plastics, and Composites		16,656	1.24	2.1%
07 Thermal & Moisture Protection		475,936	35.39	60.1%
22 Plumbing		29,864	2.22	3.8%
23 HVAC		25,226	1.88	3.2%
26 Electrical		25,960	1.93	3.3%
TOTAL DIRECT COST		791,294	58.83	100%
Design Contingency	15.00%	118,694	8.82	
General Conditions and General Requirements	11.50%	104,649	7.78	
Permits and fees	excluded	-	-	
Contractor's OH&P	5.00%	45,499	3.38	
Escalation (midpoint 2Q 2023)	5.00%	53,007	3.94	
Construction Contingency	excluded	-	-	
TOTAL ESTIMATED CONSTRUCTION COST		1,113,143	82.76	



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Horace Mann Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
1	02 Existing Conditions						
2	024100 <i>Selective Demolition</i>						
3	<i>Roof Demolition</i>						
4	Remove and disposed of existing roof - see Hazardous Materials Assessment	13,450	sf		Included		
5	Roof drain remove	2	ea		with plumbing		
6	Remove and dispose of access hatch	1	ea	450.00	450		
7	Existing insulation thickness test cut	4	ea	150.00	600		
8	Remove and dispose of all exiting exhaust fence curb and flashing	62	lf	18.00	1,116		
9	Remove and dispose of chimney flashing	22	lf	6.50	143		
10	Remove and dispose of vent flashing	16	ea	40.00	640		
11	Cutting and patching	1	ls	3,500.00	3,500		
12	Dispose, cart away	1	ls	400.00	400		
13	Temporary roof protection	13,450	sf	1.20	16,140		
14	Dust control	1	ls	4,708.00	4,708		
15	Allowance for overhead protection building entrance below.	150	sf	20.00	3,000		
16							
17	026000 <i>Hazardous Materials Assessment</i>						
18	ACM & PCB Abatement of roof	13,450	sf	13.50	181,575		
19							
20	Subtotal: Existing Conditions					\$ 212,272	
21							
22	05 Metals						
23	051000 <i>Structural Steel Framing</i>						
24	No work show in this section						
25	053000 <i>Metal Decking</i>						
26	Roof deck replacement at Roof B1 damaged areas, assumed 5% of roof area	673	sf	8.00	5,380		
27							
28	Subtotal: Metals					\$ 5,380	
29							
30							
31	06 Wood, Plastics, and Composites						
32	061600 <i>Rough Carpentry</i>						
33	Install new curbing for all HAVC equipment 12" above new roof	56	lf	48.00	2,688		
34	New 3x Pressure treated blocking at roof edge	538	lf	24.00	12,912		
35	Roof curb with two block between original building and 1955 addition	66	lf	16.00	1,056		
36							
37	Subtotal: Wood, Plastics, and Composites					\$ 16,656	
38							
39	07 Thermal & Moisture Protection						
40	075000 <i>Membrane Roofing</i>						
41	<i>New Construction</i>						
42	90 mil EDPM roofing system; 30 year warranty	13,450	sf	30.00	403,500		
43	Tapered crickets	4	ea	80.00	320		
44	New walkway pad, assumed 10% of roof area	1,345	sf	6.50	8,743		
45							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Horace Mann Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
46	076500 <i>Flashing and Sheet Metal</i>						
47	Roof edge metal fascia and securement, continuous extruded aluminum cleat, continuous aluminum hook strip with stainless fasteners	538	lf	49.00	26,362		
48	Snap-on aluminum cover	538	lf	38.00	20,444		
49	New flashing at HAVC equipment curbing	56	lf	14.00	784		
50	Stainless steel chimney flashing	20	lf	32.00	640		
51	Access hatch flashing	16	lf	18.00	288		
52	Vents pipe flashing	12	ea	85.00	1,020		
53	Roof drain flashing	6	ea	350.00	2,100		
54	Misc. roof flashing	1	al	1,500.00	1,500		
55							
56	077100 <i>Roof Specialties</i>						
57	Access hatch	1	ea	4,250.00	4,250		
58							
59	079100 <i>Joint Sealants</i>						
60	Exterior caulking and sealants at all roof penetrations	13,450	sf	0.45	5,985		
61							
62	Subtotal: Thermal & Moisture Protection					\$ 475,936	
63							
64	22 Plumbing						
65	Demolition						
66	Roof drains	6	ea	332.10	1,993		
67							
68	New						
69	Sanitary vent system						
70	Extend vent piping to 24"	14	ea	570.00	7,980		
71							
72	Roof drainage system						
73	Roof drain including new piping/insulation and tie-in to existing, Allowance	6	ea	1,648.50	9,891		Assume 4" drains
74							
75	Materials supply and bidding/market conditions allowance	1	ls	5,000.00	5,000		
76	Supervision/PM	1	ls	5,000.00	5,000		
77							
78	Subtotal: Plumbing					\$ 29,864	
79							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Horace Mann Elementary School

	Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
80	23	HVAC						
81		Demolition						
82		Exhaust fans, store on site for reinstallation, Allowance	4	ea	764.10	3,056		
83								
84		New						
85		Exhaust fans, reinstall previously removed	4	ea	1,167.52	4,670		
86								
87		Miscellaneous to include seismic controls and testing/start-up	1	ls	2,500.00	2,500		
88		Materials supply and bidding/market conditions allowance	1	ls	10,000.00	10,000		
89								
90		Supervision/PM	1	ls	5,000.00	5,000		
91		Subtotal: HVAC					\$ 25,226	
92	26	Electrical						
93		Demolition						
94		Disconnect and makes safe exhaust fans, for removal by others	4	ea	300.00	1,200		
95		Re-work/remove/replace any conduit/wire as necessary, Allowance	1	ls	2,000.00	2,000		
96								
97		New						
98		Equipment and machinery power						
99		Extend circuit if necessary and reconnect exhaust fans	4	ea	1,390.02	5,560		
100								
101		Miscellaneous to include seismic controls and testing/start-up	1	ls	700.00	700		
102		Materials supply, small job premium and bidding/market conditions allowance	1	ls	15,000.00	15,000		
103								
104		Supervision/PM	1	ls	1,500.00	1,500		
105								
106		Subtotal: Electrical					\$ 25,960	
107								

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

HORACE MANN ELEMENTARY SCHOOL, MELROSE, MA PRE-RENOVATION HBMA SERVICES

TO: Denise M. Gaffey – Directory and City Planner – City of Melrose
FROM: Frank Rodrigues – Tighe & Bond
COPY: Matthew Wzorek – Tighe & Bond
DATE: June 8, 2022

Tighe & Bond Inc., (Tighe & Bond) has prepared the following technical memorandum to summarize the Hazardous Building Material Assessment (HBMA) conducted at the Horace Mann Elementary School. (the "Site"). A facility improvement project, which includes full replacement of the existing roof is currently proposed for the school building. The current roof systems consists of a rubber membrane roof system with fiberboard insulation applied onto a metal roof deck. The HBMA was limited to the roof area being proposed for renovation impact. As required by state and federal regulations, characterization of various waste streams generated during construction projects must be completed to ensure their proper management.

The Assessment included a visual observation and bulk sampling of suspect hazardous building materials (asbestos, painted/coated building materials), and a visual inventory of other hazardous/regulated wastes (i.e., mercury-containing equipment, refrigerants, PCB-containing equipment, etc.). The HBMA was performed to support the proposed facility improvement project and to address/prepare budgets for management of environmentally related building materials.

Tighe & Bond's assessment and report are subject to the HBMA Limitations provided as Appendix A. The Assessment was performed on May 20, 2022, by Tighe & Bond's Massachusetts licensed asbestos inspector, Francisco J. Rodrigues, (#AI040131). Mr. Rodrigues' inspector license and certification are included as Appendix B of this report.

1 Hazardous Building Materials Assessment

1.1 Asbestos-Containing Building Materials

Prior to any type of building renovation or demolition, a thorough investigation is required to identify and quantify asbestos containing materials (ACM) which may be impacted by the demolition or renovation activities. The survey is required by the United States Environmental Protection Agency (EPA) National Emissions Standard for Hazardous Air Pollutants (NESHAP) regulations (Title 40 CFR, Part 61, Subpart M); Massachusetts Department of Environmental Protection (MassDEP) regulations (310 CMR 7.15); Massachusetts Department of Labor Standards (MADLS) regulations, (454 CMR 28.00); as well as applicable portions of the Occupational Safety and Health Administration (OSHA) asbestos in construction regulations (CFR 1926.1101).

The asbestos assessment was limited to accessible areas of the roof and roof top equipment to determine the presence or absence of suspect ACM that have potential for disturbance during the proposed renovation activities and would be subject to abatement prior to roof replacement.

Suspect materials were divided into "homogeneous materials", building materials which were determined by the inspector to be homogeneous based on their color, texture, and age. A number of bulk samples of suspect ACM from each homogenous group of materials were collected in general accordance with standards described in the Environmental Protection Agency (EPA) Asbestos Hazard and Emergency Response Act (AHERA) Regulations for schools. AHERA sampling protocols are only recommended for use by MassDEP and EPA as they do not regulate bulk sampling standards.

Bulk samples were collected and submitted to Aerobiology Laboratories Associates Inc., (Aerobiology) of Woburn, Massachusetts for analysis via Polarized Light Microscopy with Dispersion Staining (PLM/DS) in accordance with the EPA/600/R-93/116 Method. ProScience is a Massachusetts licensed and American Industrial Hygiene Association (AIHA)-accredited asbestos laboratory.

Suspect materials identified and sampled are included as inventory tables in Appendix C. The tables describes material locations, sample numbers, quantities, condition, analytical results, and specific comments relative to our findings. The asbestos laboratory report is included in Appendix D.

The MassDEP defines a material that contains greater than or equal to one percent ($\geq 1\%$) asbestos utilizing PLM/DS, as being an ACM. Materials that are identified as "none detected" are specified as not containing asbestos. Materials containing less than one percent ($< 1\%$) asbestos are regulated to a degree by OSHA related to work practices, worker exposure, and waste containerization and in Massachusetts, materials containing $< 1\%$ asbestos are considered asbestos-containing waste material (ACWM) and must be packaged and disposed of as ACWM in accordance with 310 CMR 7.15.

A total of nine homogeneous areas were identified during the inspection and 18 samples of suspect ACM were collected. The tar material or hot mop applied to the roof deck in the original section of the roof was determined to contain $< 1\%$ asbestos and therefore is classified as an ACWM.

Samples of other suspect ACM collected during the survey, were determined to be non-asbestos containing. Refer to Appendix C for a list of each suspect material identified and sampled.

Other suspect materials encountered during any renovation activities that are not identified in this report as being non-ACM should be assumed to be ACM until sample collection and laboratory analysis indicate otherwise.

Tighe & Bond recommends the bottommost roofing layer be treated as ACM. The ACMs identified at the Horace Mann School should be removed by a licensed asbestos abatement contractor, utilizing trained and licensed personnel prior to renovation, demolition or any activity that has the potential to disturb these materials. Tighe & Bond recommends the creation of a project specific asbestos abatement scope of work or technical specification for the removal of ACM. The specification must be developed by a Massachusetts licensed asbestos project designer, and it should address such important issues as regulatory requirements, notification procedures, insurance considerations, air sampling needs and other pertinent information. Abatement activities must be subject to a passing post abatement visual inspection by an asbestos monitoring firm not affiliated with the abatement contractor. The same firm typically collects, analyzes and reports the State required post abatement clearance air samples.

The current scope of construction does not call for the removal of the metal roof deck. In the event sections of the roof deck must be cut and replaced Tighe & Bond recommends those sections be removed by a licensed asbestos abatement contractor.

1.2 Universal Waste and Other Regulated Building Waste

Tighe & Bond performed a visual inspection of the proposed renovation areas to identify hazardous materials, universal waste materials or other regulated wastes that have the potential for disturbance during the roof replacement project. No regulated wastes were identified.

Appendices:

APPENDIX A: HBMA Limitations

APPENDIX B: Inspector's Certification

APPENIDX C: Suspect Asbestos Containing Materials Inventory Table

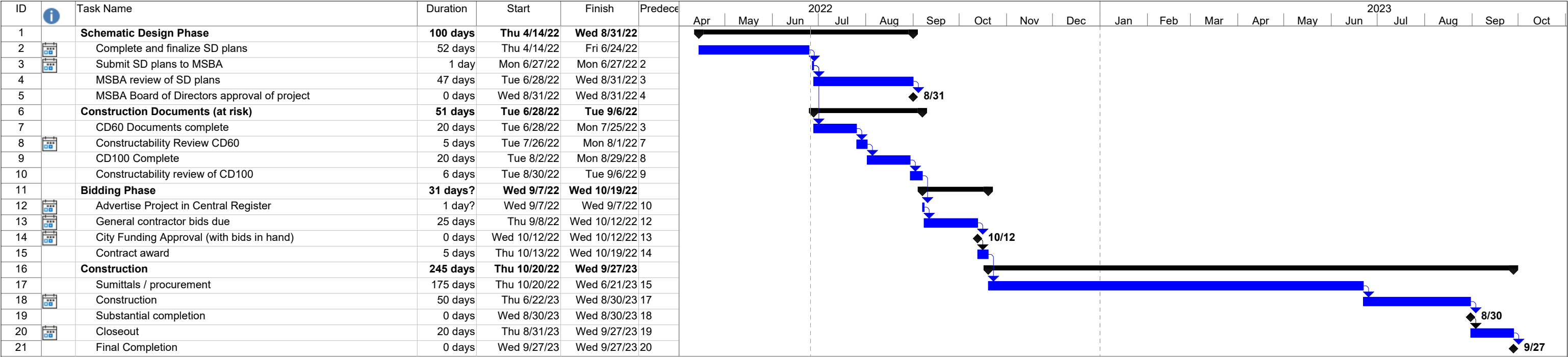
APPENDIX D: Asbestos Laboratory Report

J:\M\M1215\026 Melrose\HBMA\Horace Mann\Final Report\Horace Mann_Tech Memo_Final.docx

**EXHIBIT C
PROJECT SCHEDULE
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

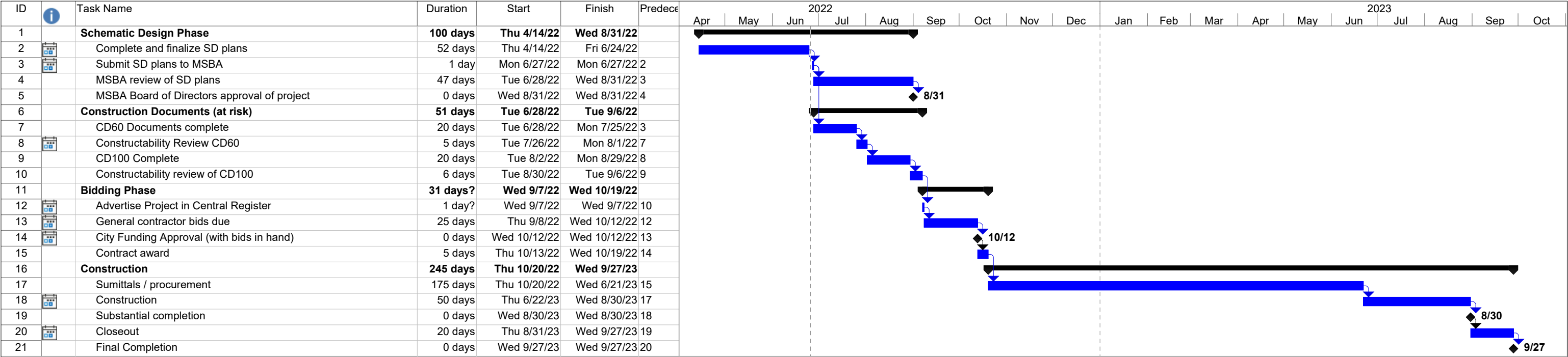
Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT



Hoover Elementary School - Melrose, MA
Date: Sun 6/26/22

Task		Project Summary		Inactive Summary		Manual Summary		External Milestone	
Split		External Tasks		Manual Task		Start-only		Progress	
Milestone		External Milestone		Duration-only		Finish-only		Deadline	
Summary		Inactive Milestone		Manual Summary Rollup		External Tasks			



Horace Mann Elementary School - Melrose, MA
Date: Sun 6/26/22

Task		Project Summary		Inactive Summary		Manual Summary		External Milestone	
Split		External Tasks		Manual Task		Start-only		Progress	
Milestone		External Milestone		Duration-only		Finish-only		Deadline	
Summary		Inactive Milestone		Manual Summary Rollup		External Tasks			

**EXHIBIT D
CASH FLOW
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

Melrose Public Schools Hoover Elementary School - CASH FLOW	Budget	To Date	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Total	Remainin
OPM Feasibility Study	\$7,500	\$7,500																		\$7,500	
A&E Feasibility Study	\$49,100	\$49,100																		\$49,100	
OPM - Construction Contract Documents	\$20,434		\$10,217	\$10,217																\$20,434	
OPM - Bidding	\$8,960				\$4,480	\$4,480														\$8,960	
OPM - Construction Contract Administration	\$101,045						\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000	\$30,000	\$30,000	\$13,545			\$101,045	
OPM - Closeout	\$12,558																	\$6,279	\$6,279	\$12,558	
OPM - Reimbursable & Other Services	\$5,000				\$2,500	\$2,500														\$5,000	
AE - Construction Contract Documents	\$60,400		\$30,200	\$30,200																\$60,400	
AE - Bidding	\$4,400				\$2,200	\$2,200														\$4,400	
AE - Construction Contract Administration	\$34,600						\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$9,000	\$9,000	\$9,000	\$600			\$34,600	
AE - Closeout	\$3,600																	\$1,800	\$1,800	\$3,600	
AE - Hazardous Materials	\$10,700		\$1,500	\$1,500										\$2,700	\$2,500	\$2,500				\$10,700	
Construction Budget	\$1,881,016											\$150,000	\$150,000	\$200,000	\$500,000	\$500,000	\$200,000	\$181,016		\$1,881,016	
Construction Contingency	\$94,051											\$7,500	\$7,500	\$10,000	\$25,000	\$25,000	\$10,000	\$9,051		\$94,051	
Owner's Contingency	\$13,085																	\$7,000	\$6,085	\$13,085	
Total Project Budget	\$2,306,449	\$56,600	\$41,917	\$41,917	\$9,180	\$9,180	\$3,500	\$3,500	\$3,500	\$3,500	\$3,500	\$161,000	\$161,000	\$231,700	\$566,500	\$566,500	\$224,145	\$205,146	\$14,164	\$2,306,449	
Cummulative Cash Out		\$56,600	\$98,517	\$140,434	\$149,614	\$158,794	\$162,294	\$165,794	\$169,294	\$172,794	\$176,294	\$337,294	\$498,294	\$729,994	\$1,296,494	\$1,862,994	\$2,087,139	\$2,292,285	\$2,306,449		

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

Melrose Public Schools Horace Mann Elementary School - CASH FLOW	Budget	To Date	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Total	Remainin
OPM Feasibility Study	\$7,500	\$7,500																		\$7,500	
A&E Feasibility Study	\$40,700	\$40,700																		\$40,700	
OPM - Construction Contract Documents	\$20,434		\$10,217	\$10,217																\$20,434	
OPM - Bidding	\$8,960				\$4,480	\$4,480														\$8,960	
OPM - Construction Contract Administration	\$101,045						\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000	\$30,000	\$30,000	\$13,545			\$101,045	
OPM - Closeout	\$12,558																	\$6,279	\$6,279	\$12,558	
OPM - Reimbursable & Other Services	\$5,000				\$2,500	\$2,500														\$5,000	
AE - Construction Contract Documents	\$41,400		\$20,700	\$20,700																\$41,400	
AE - Bidding	\$4,400				\$2,200	\$2,200														\$4,400	
AE - Construction Contract Administration	\$28,800						\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$8,000	\$8,000	\$8,000	\$1,300			\$28,800	
AE - Closeout	\$3,600																	\$1,800	\$1,800	\$3,600	
AE - Hazardous Materials	\$5,400		\$750	\$750										\$1,500	\$1,500	\$900				\$5,400	
Construction Budget	\$1,113,143											\$50,000	\$50,000	\$100,000	\$300,000	\$300,000	\$200,000	\$113,143		\$1,113,143	
Construction Contingency	\$55,657											\$2,500	\$2,500	\$5,000	\$15,000	\$15,000	\$10,000	\$5,657		\$55,657	
Owner's Contingency	\$11,580																	\$6,000	\$5,580	\$11,580	
Total Project Budget	\$1,460,177	\$48,200	\$31,667	\$31,667	\$9,180	\$9,180	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$55,500	\$55,500	\$124,500	\$354,500	\$353,900	\$224,845	\$132,879	\$13,659	\$1,460,177	
Cummulative Cash Out		\$48,200	\$79,867	\$111,534	\$120,714	\$129,894	\$132,894	\$135,894	\$138,894	\$141,894	\$144,894	\$200,394	\$255,894	\$380,394	\$734,894	\$1,088,794	\$1,313,639	\$1,446,518	\$1,460,177		

**EXHIBIT E
PROJECT SITE
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

**Herbert Clark Hoover Elementary School
37 Glendower Road
Melrose, MA 02176**

**Horace Mann Elementary School
40 Damon Ave
Melrose, MA 02176**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

**EXHIBIT F
FURNISHINGS AND EQUIPMENT
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

THERE IS NO EXHIBIT F

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

EXHIBIT G
STANDARD CONSTRUCTION CONTRACT INSURANCE
PROVISIONS FOR AN OWNER-CONTRACTOR CONTRACT
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

EXHIBIT "G"

**MASSACHUSETTS SCHOOL BUILDING AUTHORITY
STANDARD CONSTRUCTION CONTRACT INSURANCE PROVISIONS FOR AN
OWNER-CONTRACTOR CONTRACT
(Alternate Form for Construction Manager at Risk on Page 6 of this Exhibit)**

The District shall include, at a minimum, the following language regarding insurance requirements in the Owner-Contractor contract. The District may impose additional insurance requirements provided that any such additional requirements shall not be inconsistent with the requirements imposed by the standard language set forth herein and further provided that, prior to issuing an invitation for bids for construction of the Project, the District shall give the Authority adequate written notice clearly describing any such additional requirements so that the Authority may, at its discretion, review and comment upon such additional requirements. Any such additional requirements may be set forth in Section 8 of the Insurance Requirements below. It shall be the sole responsibility of the District to determine whether additional insurance requirements are desirable or necessary for the Project and should be included in the Owner-Contractor contract.

INSURANCE REQUIREMENTS (Design-Bid-Build)**1. Insurance Generally.**

A. The Contractor shall purchase and maintain insurance of the type and limits listed in this Article with respect to the operations as well as the completed operations of this Contract. This insurance shall be provided at the Contractor's expense and shall be in full force and effect for the full term of the Contract or for such longer period as this Article requires.

B. All policies shall be written on an occurrence basis and be issued by companies lawfully authorized to write that type of insurance under the laws of the Commonwealth with a financial strength rating of A- or better as assigned by AM Best Company, or an equivalent rating assigned by a similar rating agency acceptable to the Owner, or as otherwise acceptable to the Owner.

C. The Contractor shall submit three originals of each certificate of insurance, acceptable to the Owner, simultaneously with the execution of this Contract. Certificates shall show each type of insurance, insurance company, policy number, amount of insurance, deductibles and/or self-insured retentions, and policy effective and expiration dates. Certificates shall show the Massachusetts School Building Authority (hereinafter "Authority"), the Owner and anyone else the Owner may request as additional insureds as to all policies of liability insurance. Certificates shall specifically note the following:

- that the automobile liability, umbrella liability and pollution liability policies include the Authority and the Owner as additional insureds;
- that all policies include the coverage and endorsements in accordance with the terms and conditions as required by this Contract;
- that none of the coverages shall be cancelled, terminated, or materially modified unless and until thirty (30) days prior notice is given in writing to the Owner and the Authority;
- the Contractor shall submit updated certificates of insurance prior to the expiration of any of the policies referenced in the certificates so that the Owner shall at all times possess certificates indicating current coverage.

D. The Contractor shall file one certified, complete copy of all policies and endorsements with the Owner within sixty (60) days after Contract award. If the Owner is damaged by the Contractor's failure to maintain such insurance and to comply with the terms of this Article, then the Contractor shall be responsible for all costs and damages to the Owner and the Authority attributable thereto.

E. Termination, cancellation, or material modification of any insurance required by this Contract, whether by the insurer or the insured, shall not be valid unless written notice thereof is given to the Owner, and the Authority to the extent that the Authority is an additional insured, at least thirty (30) days prior to the effective date thereof, which shall be expressed in said notice.

F. The Contractor is responsible for the payment of any and all deductibles under all of the insurance required herein. Neither the Owner nor the Authority shall in any instance be responsible for the payment of deductibles, self-insured retentions, or any portion thereof.

2. Contractor's Commercial General Liability.

A. The Contractor shall purchase and maintain general liability coverage on the ISO form CG 00 01 or equivalent, including products and completed operations, on an occurrence basis. The form must be amended to state that the aggregate limit applies on a per location/project basis. The policy shall provide the following minimum coverage to protect the Contractor from claims with respect to the operations performed by Contractor and any employee, subcontractor, or supplier, or by anyone for whose acts they may be liable unless a higher coverage is specified in Section 8 below in which case the Contractor shall provide the additional coverage:

Bodily Injury &	\$1,000,000 each occurrence
Property Damage	\$2,000,000 general aggregate per project
Products & Completed Operations	\$1,000,000 annual aggregate
Personal & Advertising Injury	\$1,000,000 each occurrence
Medical Expenses	\$5,000

B. This policy shall include coverage relating to explosion, collapse, and underground property damage.

C. This policy shall include contractual liability coverage.

D. The completed operations coverage shall be maintained for a period of three (3) years after Substantial Completion and acceptance by the Owner. The Contractor shall provide renewal certificates of insurance to the Owner as evidence that this coverage is being maintained.

E. If the Work includes work to be performed within fifty (50) feet of a railroad, any exclusion for liability assumed under contract for work within fifty (50) feet of a railroad shall be deleted.

F. This policy shall include the Authority, the Owner and anyone else requested by the Owner as additional insureds via endorsements CG 20 10 for ongoing operations and CG 20 37 for completed operations. This policy shall be primary and non-contributory with respect to any other insurance available to additional insureds.

G. The policy shall include endorsement CG 24 04, a Waiver of Subrogation in favor of the Authority and the Owner.

3. Automobile Liability.

A. The Contractor shall purchase and maintain the following minimum coverage with respect to the operations of any owned, non-owned, and hired vehicles including trailers used in the performance of the work, unless a higher coverage is specified in Section 8 below in which case the Contractor shall provide the additional coverage:

Bodily Injury & Property Damage \$1,000,000 combined single limit

B. The policy shall include a CA 99 48 Broadened Pollution Endorsement. If specified in Section 8 below, the Contractor, if hauling contaminants and/or pollutants, must adhere to Sections 29 and 30 of the Motor Carrier Act of 1980, which shall include coverage Form MCS-90.

C. The policy shall name the Authority and the Owner as additional insureds.

D. The policy shall contain a Waiver of Subrogation in favor of the Owner and the Authority.

4. Contractor's Pollution Liability.

The Contractor shall purchase and maintain coverage for bodily injury and property damage resulting from liability arising out of pollution related exposures such as asbestos abatement, lead paint abatement, tank removal, removal of contaminated soil, etc. The insurance policy shall cover the liability of the Contractor during the process of removal, storage, transport and disposal of hazardous waste and contaminated soil and/or asbestos abatement. The policy shall include coverage for on-Site and off-Site bodily injury and loss of, damage to, or loss of use of property, directly or indirectly arising out of the discharge, dispersal, release or escape of smoke, vapors, soot, fumes, acids, alkalis, toxic chemicals, liquids or gas, waste materials or other irritants, contaminants or pollutants into or upon the land, the atmosphere or any water course or body of water, whether it be gradual or sudden and accidental. The policy shall also include defense and clean-up costs. The Authority and the Owner shall be named as additional insureds and coverage must be on an occurrence basis. The amount of coverage shall be as follows unless a higher amount is specified in Section 8 below to this Contract, in which case the Contractor shall provide the additional coverage:

Limit of liability	\$1,000,000 per occurrence
	\$3,000,000 aggregate

5. Worker's Compensation.

A. The Contractor shall provide the following coverage in accordance with M.G.L. c.149 §34A and c.152, as amended, unless a higher coverage is specified in Section 8 below, in which case the Contractor shall provide the higher coverage:

Worker's Compensation	Statutory limits
Employer's Liability	\$ 500,000 each accident
	\$ 500,000 disease per employee
	\$ 500,000 disease policy aggregate

B. If specified in Section 8 below, the policy must be endorsed to cover United States Longshoremen & Harborworkers Act (USLHW), or Maritime Liability.

C. The policy shall contain a Waiver of Subrogation in favor of the Authority and the Owner.

6. Builder's Risk/ Installation Floater/Stored Materials.

Owner may purchase and maintain coverage against loss or damage to the Work included in this Contract. If purchased by Owner, such coverage shall be on an "all risks" or equivalent form and will include a waiver of subrogation in favor of Contractor for loss or damage that occurs during the term of the Project. Owner will be responsible for the payment of any deductible under such coverage.

If specified in Section 8 below , Owner may require the Contractor to purchase and maintain coverage against loss or damage to the Work in accordance with the following requirements:

A. The Contractor shall purchase and maintain coverage against loss or damage on all Work included in this Contract in an amount equal to the Contract Price. Such coverage shall be written on an all risks basis or equivalent form and shall include, without limitation, insurance against perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, terrorism ("certified" and "non-certified"), collapse, earthquake, flood (if the project is not in an "A" or a "V" flood Zone), windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for Architect's and Contractor's services and expenses required as a result of such insured loss. Unless otherwise specified in this Contract, the limits for earthquake and flood shall each be the lesser of the Contract Price or \$10,000,000. This policy and/or installation floater shall include transportation and Stored Materials coverage in an amount equal to the value of the stored materials as required in C. below.

B. When Work will be completed on existing buildings owned by the Owner, the Contractor shall provide an installation floater, in the full amount of the Contract Price. Such coverage shall be written on an all risks basis or equivalent form and shall include, without limitation, insurance against perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, collapse, earthquake, flood (if the project is not in an "A" or a "V" flood Zone), windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for Architect's and Contractor's services and expenses required as a result of such insured loss. Unless otherwise specified in this Contract, the limits for earthquake and flood shall each be the lesser of the Contract Price or \$10,000,000. This policy and/or installation floater shall include transportation and Stored Materials coverage in an amount equal to the value of the stored materials as required in C. below.

C. The Contractor shall maintain insurance on delivered and/or stored material designated to be incorporated in the Work against fire, theft or other hazards. Any loss or damage of whatever nature to such material while stored at an off Site location shall be forthwith replaced by the Contractor at no expense to the Owner or the Authority..

D. The policy or policies shall specifically state that they are for the benefit of and payable to the Authority, the Owner, the Contractor, and all persons furnishing labor or labor and materials for the Contract Work, as their interests may appear. The policy or policies shall list the Authority, the Owner, the Contractor, and Subcontractors of any tier as named insureds.

E. Coverage shall include any costs for work performed by the Designer or any consultant as the result of a loss experienced during the term of this Contract.

F. Coverage shall include permission for temporary occupancy and a Waiver of Subrogation in favor of the Owner and the Authority.

G. Coverage shall be maintained until final acceptance by the Owner of the Work and final payment has been made.

H. A loss under the property insurance shall be adjusted by the Contractor as fiduciary and made payable to the Contractor as fiduciary for the insureds. The Contractor shall pay the subcontractors their just shares of insurance proceeds received by the Contractor and shall require subcontractors to make payments to their sub-subcontractors in similar manner.

7. Umbrella Coverage.

The Contractor shall provide Umbrella Coverage in a form at least as broad as primary coverages required by Sections 2, 3 and 5 of this Article in the following amount unless a higher amount is specified in Section 8 below in which case the Contractor shall provide the higher amount:

<u>Contract Price:</u>	<u>Limit of Liability:</u>
Under \$1,000,000	\$2,000,000 per occurrence
\$1,000,001 -- \$5,000,000	\$5,000,000 per occurrence
\$5,000,001-- \$10,000,000	\$10,000,000 per occurrence
\$10,000,001 and over	\$25,000,000 per occurrence

8. Additional Insurance Requirements

The Contractor shall provide such other and/or additional types and/or amounts of insurance as may be set forth below:

MASSACHUSETTS SCHOOL BUILDING AUTHORITY
STANDARD CONSTRUCTION CONTRACT INSURANCE PROVISIONS FOR A
CONSTRUCTION MANAGER AT RISK CONTRACT

The District shall include, at a minimum, the following language regarding insurance requirements in the Owner-Construction Manager at Risk ("CM") contract. The District may impose additional insurance requirements provided that any such additional requirements shall not be inconsistent with the requirements imposed by the standard language set forth herein and further provided that, prior to issuing an RFQ for construction management at risk services for the Project, the District shall give the Authority adequate written notice clearly describing any such additional requirements so that the Authority may, at its discretion, review and comment upon such additional requirements. Any such additional requirements may be set forth in Section 8 of the Insurance Requirements below. It shall be the sole responsibility of the District to determine whether additional insurance requirements are desirable or necessary for the Project and should be included in the Owner-CM contract.

INSURANCE REQUIREMENTS (CM at Risk)

1. Insurance Generally.

A. The CM shall purchase and maintain the insurance of the type and limits listed in this Article with respect to the operations as well as the completed operations of this Contract. This insurance shall be provided at the CM's expense and shall be in full force and effect for the full term of the Contract or for such longer period as this Article requires.

B. All policies shall be written on an occurrence basis and be issued by companies lawfully authorized to write that type of insurance under the laws of the Commonwealth with a financial strength rating of A- or better assigned by AM Best Company, or equivalent rating assigned by a similar rating agency acceptable to the Owner or as otherwise acceptable to the Owner.

C. CM shall submit three originals of each certificate of insurance, acceptable to the Owner, simultaneously with the execution of this Contract. Certificates shall show each type of insurance, insurance company, policy number, amount of insurance, deductibles and/or self insured retentions, and policy effective and expiration dates. Certificates shall show the Massachusetts School Building Authority (hereinafter "Authority"), the Owner and anyone else that the Owner may request as additional insureds as to all policies of liability insurance. Certificates shall specifically note the following:

- that the automobile liability, umbrella liability and pollution liability policies include the Owner and the Authority as additional insureds;
- that all policies include the coverage and endorsements in accordance with the terms and conditions as required by this construction contract;
- that none of the coverages shall be cancelled, terminated, or materially modified unless and until thirty (30) days prior notice is given in writing to the Owner and the Authority;
- CM shall submit updated certificates prior to the expiration of any of the policies referenced in the certificates so that the Owner shall at all times possess certificates indicating current coverage.

D. The CM shall file one certified complete copy of all policies and endorsements with the Owner within sixty (60) days after Contract award. If the Owner or the Authority is damaged by the CM's failure to maintain such insurance and to comply with the terms of this Article, then the CM shall be responsible for all costs and damages to the Owner and the Authority attributable thereto.

E. Termination, cancellation, or material modification of any insurance required by this Contract, whether by the insurer or the insured, shall not be valid unless written notice thereof is given to Owner, and the Authority to the extent that the Authority is an additional insured, at least thirty (30) days prior to the effective date thereof, which shall be expressed in said notice.

F. The CM is responsible for the payment of any and all deductibles under all of the insurance required below unless the Owner and the Authority specifically provide a written waiver to the CM.

2. CM's Commercial General Liability.

A. The CM shall purchase and maintain general liability coverage on the ISO form CG 00 01 or equivalent, including products and completed operations, on an occurrence basis. The form must be amended to state that the aggregate limit applies on a per location/per project basis. The policy shall provide the following minimum coverage to protect the CM from claims with respect to the operations performed by CM and any employee, subcontractor, or supplier, unless a higher coverage is specified in Section 8 below, in which case the CM shall provide the additional coverage:

Bodily Injury &	\$1,000,000	each occurrence
Property Damage	\$2,000,000	general aggregate, per project
Products & Completed Operations	\$1,000,000	annual aggregate
Personal & Advertising Injury	\$1,000,000	each occurrence
Medical Expenses	\$5,000	

B. This policy shall include coverage relating to explosion, collapse, and underground property damage.

C. This policy shall include contractual liability coverage.

D. The completed operations coverage shall be maintained for a period of three (3) years after Substantial Completion and acceptance by the Owner. The CM shall provide renewal certificates of insurance to the Owner as evidence that this coverage is being maintained.

E. If the Work includes work to be performed within fifty (50) feet of a railroad, any exclusion for liability assumed under contract for work within fifty (50) feet of a railroad shall be deleted.

F. This policy shall include the Authority, the Owner and anyone else requested by the Owner as additional insureds via endorsements CG 20 10 for ongoing operations and CG 20 37 for completed operations. This policy shall be primary and non-contributory with respect to any other insurance available to additional insureds.

G. The policy shall include endorsement CG 24 04, a Waiver of Subrogation in favor of the Owner and the Authority.

3. Automobile Liability.

A. The CM shall purchase and maintain the following minimum coverage with respect to the operations of any owned, non-owned, and hired vehicles including trailers used in the performance of the work, unless a higher coverage is specified in Section 8 below, in which case the CM shall provide the additional coverage:

Bodily Injury & Property Damage \$1,000,000 combined single limit

B. The policy shall include a CA 99 48 Broadened Pollution Endorsement. If specified in Section 8 below, the CM, if hauling contaminants and/or pollutants, must adhere to Sections 29 and 30 of the Motor Carrier Act of 1980, which shall contain coverage Form MCS-90.

C. The policy shall name the Owner and the Authority as additional insureds.

D. The policy shall contain a Waiver of Subrogation in favor of the Owner and the Authority.

4. Contractor's Pollution Liability.

The CM shall purchase and maintain coverage for bodily injury and property damage resulting from liability arising out of pollution related exposures such as asbestos abatement, lead paint abatement, tank removal, removal of contaminated soil, etc. The insurance policy shall cover the liability of the CM during the process of removal, storage, transport and disposal of hazardous waste and contaminated soil and/or asbestos abatement. The policy shall include coverage for on-Site and off-Site bodily injury and loss of, damage to, or loss of use of property, directly or indirectly arising out of the discharge, dispersal, release or escape of smoke, vapors, soot, fumes, acids, alkalis, toxic chemicals, liquids or gas, waste materials or other irritants, contaminants or pollutants into or upon the land, the atmosphere or any water course or body of water, whether it be gradual or sudden and accidental. The policy shall also include defense and clean-up costs. The Owner and the Authority shall be named as additional insureds and coverage must be on an occurrence basis. The amount of coverage shall be as follows unless a higher amount is specified in Section 8 below, in which case the CM shall provide the additional coverage:

Limit of liability	\$1,000,000 per occurrence
	\$3,000,000 aggregate

5. Worker's Compensation.

A. The CM shall provide the following coverage in accordance with M.G.L. c.149 §34A and c.152 as amended, unless a higher coverage is specified in Section 8 below, in which case the CM shall provide the higher coverage:

Workers' Compensation	Statutory limits
Employer's Liability	\$ 500,000 each accident
	\$ 500,000 disease per employee
	\$ 500,000 disease policy aggregate

B. If specified in Section 8 below the policy must be endorsed to cover United States Longshoremens & Harborworkers Act (USLHW), or Maritime Liability for \$1,000,000/\$1,000,000.

C. The policy shall contain a Waiver of Subrogation in favor of the Owner and the Authority.

6. Builder's Risk/ Installation Floater/Stored Materials.

Owner may purchase and maintain coverage against loss or damage to the Work included in this Contract. If purchased by Owner, such coverage shall be on an "all risks" or equivalent form and will include a waiver of subrogation in favor of CM for loss or damage that occurs during the term of the Project. Owner will be responsible for the payment of any deductible under such coverage.

If specified in Section 8 below, Owner may require the CM to purchase and maintain coverage against loss or damage to the Work in accordance with the following requirements:

A. The CM shall purchase and maintain coverage against loss or damage on all Work included in this Contract in an amount equal to the GMP. Such coverage shall be written on an all risks basis or equivalent form and shall include, without limitation, insurance against perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, terrorism ("certified" and "non-certified"), collapse, earthquake, flood (if the project is not in an "A" or a "V" flood Zone), windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for Architect's, Program Manager's and CM's services and expenses required as a result of such insured loss. Unless otherwise specified in this Contract, the limits for earthquake and flood shall each be the lesser of the Contract Price or \$10,000,000. This policy and/or installation floater shall include transportation and Stored Materials coverage in an amount equal to the value of the stored materials as required in **C.** below.

B. When Work will be completed on existing buildings owned by the Owner, the CM shall provide an installation floater, in the full amount of the Contract Price. Such coverage shall be written on an all risks basis or equivalent form and shall include, without limitation, insurance against perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, collapse, earthquake, flood (if the project is not in an "A" or a "V" flood Zone), windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for Architect's, Program Manager's and CM's services and expenses required as a result of such insured loss. Unless otherwise specified in this Contract, the limits for earthquake and flood shall each be the lesser of the Contract Price or \$10,000,000. This policy and/or installation floater shall include transportation and Stored Materials coverage in an amount equal to the value of the stored materials as required in **C.** below.

C. The CM shall maintain insurance on delivered and/or stored material designated to be incorporated in the Work against fire, theft or other hazards. Any loss or damage of whatever nature to such material while stored at some approved off Site location shall be forthwith replaced by the CM at no expense to the Owner or the Authority.

D. The policy or policies shall specifically state they are for the benefit of and payable to the Authority, the Owner, the CM, subcontractors and all persons furnishing labor or labor and materials for the Contract Work, as their interests may appear. The policy or policies shall list the Authority, the Owner, the CM, and Subcontractors of any tier as named insureds.

E. Coverage shall include any costs for work performed by the Designer or any consultant as the result of a loss experienced during the term of this Contract.

F. Coverage shall include permission for temporary occupancy and a Waiver of Subrogation in favor of the Owner and the Authority.

G. Coverage shall be maintained until final acceptance by Owner of the Work and final payment has been made.

H. A loss under the property insurance shall be adjusted by CM as fiduciary and made payable to the Contractor as fiduciary for the insureds. CM shall pay the subcontractors their just shares of insurance proceeds received by the CM and shall require subcontractors to make payments to their sub-subcontractors in similar manner.

7. Umbrella Coverage.

The CM shall provide Umbrella Coverage in form at least as broad as primary coverages required by Sections 2, 3 and 5 of this Article in the following amount unless a higher amount is specified in Section 8 below in which case the CM shall provide the higher amount:

<u>Contract Price:</u>	<u>Limit of Liability:</u>
Under \$1,000,000	\$2,000,000 per occurrence
\$1,000,000 -- \$5,000,000	\$5,000,000 per occurrence
\$5,000,001-- \$10,000,000	\$10,000,000 per occurrence
\$10,000,001 and over	\$25,000,000 per occurrence

8. Additional Insurance Requirements

The CM shall provide such other and/or additional types and/or amounts of insurance as may be set forth below:

**EXHIBIT H
EDUCATIONAL PROGRAM
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

THERE IS NO EXHIBIT H

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

**EXHIBIT I
REIMBURSEMENT RATE CERTIFICATION
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

MSBA Accelerated Repair Program Reimbursement Rate Certification Calendar Year 2021

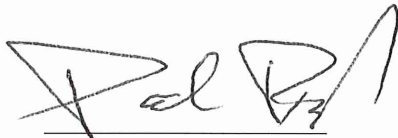
Melrose

MSBA Reimbursement Rate Calculation

Base Points	31.00
Income Factor	5.05
Property Wealth Factor	13.26
Poverty Factor	0
MSBA Reimbursement Rate	49.31

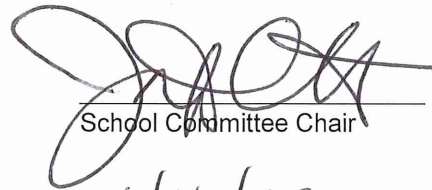
Certification

By signing this Reimbursement Rate Certification, I hereby certify that I have read, understand, and accept the reimbursement rate set forth above, and I hereby acknowledge and agree on behalf of the Eligible Applicant that the above-stated reimbursement rate is the rate that will be used to calculate the maximum Total Facilities Grant for the proposed project.



Local Chief Executive Officer

6/16/2022
Date



School Committee Chair

6/16/22
Date



Superintendent of Schools

6/16/2022
Date

**EXHIBIT J
ELECTRONIC PAYMENT FORM
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-27 : Horace Mann School Roof Replacement)

PROJECT FUNDING AGREEMENT

(Please print on District letterhead)

Banking Information Template

_____ District hereby instructs the Massachusetts School Building Authority make grant payments via electronic ACH directly to the following account:

MSBA Project ID#*: _____

***All future project payments will be made to this account unless the MSBA receives specific instructions to distribute payments to a separate account for each project.**

District Contact Name: _____

Signature: _____

District Telephone No.: _____

Banking Information for ACH Transactions

Financial Institution Name: _____

Financial Institution Address: _____

City & State: _____

Account No.: _____

Transit Number (ABA#): _____
(Routing #)

Please return the completed form to Xingzhen (Stephanie) Bai:

- via email at Xingzhen.Bai@MassSchoolBuildings.org

An acknowledgment of receipt of a new Banking Information Template will be sent to the Eligible Applicant, Treasurer or Business Manager, and District Contact listed on the form.

CHART - 2	City of Melrose - 5% Debt Limit			
DRAFT	Ten Year General Fund Debt Plan Review			
	Department of Finance			
11/7/2022			5% Limit	
	Year	Net Debt		Variance
Projected				
	2022	\$2,855,696	\$4,550,026	\$1,694,330
	2023	\$2,839,293	\$4,762,804	\$1,923,511
	2024	\$3,052,377	\$4,905,688	\$1,853,311
	2025	\$3,837,908	\$5,052,859	\$1,214,951
	2026	\$4,088,286	\$5,204,445	\$1,116,159
	2027	\$3,802,371	\$5,360,578	\$1,558,207
	2028	\$3,809,834	\$5,521,395	\$1,711,561
	2029	\$3,581,714	\$5,687,037	\$2,105,323
	2030	\$3,322,418	\$5,857,648	\$2,535,230
	2031	\$3,330,845	\$6,033,378	\$2,702,532
	Totals:	\$34,520,742	\$52,935,857	
	Average:	\$3,452,074	\$5,293,586	
	Variance:		\$1,841,512	
Note(s):	1. It is the current policy of the City of Melrose that the G/F net non-exempt debt budget equate to approx. 5% of the Operating Budget.			
	2. The figures proposed can only be "estimates". Actual figures will be developed as interest rates are locked in.			

CHART - 1	City of Melrose				
DRAFT	Ten Year General Fund Debt Plan Review				
11/7/2022	Department of Finance				
				Projected	
	Year	Net Debt	5% Limit	Budget	Percent
	2022	\$2,855,696	\$4,550,026	\$91,000,522	3.14%
	2023	\$2,839,293	\$4,762,804	\$95,256,080	2.98%
	2024	\$3,052,377	\$4,905,688	\$98,113,762	3.11%
	2025	\$3,837,908	\$5,052,859	\$101,057,175	3.80%
	2026	\$4,088,286	\$5,204,445	\$104,088,891	3.93%
	2027	\$3,802,371	\$5,360,578	\$107,211,557	3.55%
	2028	\$3,809,834	\$5,521,395	\$110,427,904	3.45%
	2029	\$3,581,714	\$5,687,037	\$113,740,741	3.15%
	2030	\$3,322,418	\$5,857,648	\$117,152,963	2.84%
	2031	\$3,330,845	\$6,033,378	\$120,667,552	2.76%
	Totals:	\$34,520,742	\$52,935,857		
	Average:	\$3,452,074	\$5,293,586		
	Variance:		\$1,841,512		
Note(s):	1. It is the current policy of the City of Melrose that the G/F net				
	non-exempt debt budget equate to approx. 5% of the Operating Budget.				
	2. The figures proposed can only be "estimates". Actual figures				
	will be developed as interest rates are locked in.				



CITY OF MELROSE

Office of Treasurer-Collector

Kathryn J Armata
Treasurer-Collector

City Hall, 562 Main Street
Melrose, Massachusetts 02176
Treasurer - (781) 979-4162
Collector - (781) 979-4120
Fax - (781) 665-6877

MEMORANDUM

To: Melrose City Council
Mayor Brodeur

From: Kathryn Armata

Date: September 20, 2022

Re: Loan Order –Herbert Clark Hoover Elementary School Roof Replacement

ORDERED: That the City appropriates \$2,306,449 for the purpose of paying costs of replacing the roof at the Herbert Clark Hoover Elementary School located at 37 Glendower Road, Melrose, Massachusetts, including the payment of all costs incidental and related thereto (the "Project"), which proposed Project would materially extend the useful life of the school and preserve an asset that otherwise is capable of supporting the required educational program, and for which the City may be eligible for a grant from the Massachusetts School Building Authority (the "MSBA"), said amount to be expended under the direction of the Office of Planning and Community Development; that to meet this appropriation, the Treasurer, with the approval of the Mayor, is authorized to borrow said amount under and pursuant to Chapter 44, Section 7(1) or Chapter 70B of the General Laws, or pursuant to any other enabling authority, and to issue bonds or notes of the City therefor; that the City acknowledges that the MSBA's grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and any project costs the City incurs in excess of any grant approved by and received from the MSBA shall be the sole responsibility of the City; that any grant that the City may receive from the MSBA for the Project shall not exceed the lesser of (1) forty-nine and thirty-one hundredths percent (49.31%) of eligible, approved project costs, as determined by the MSBA, or (2) the total maximum grant amount determined by the MSBA; and that the amount of the borrowing authorized by this order shall be reduced by any grant amount set forth in and received pursuant to the Project Funding Agreement that may be executed between the City and the MSBA.

Pursuant to Section 56-14 of the City Ordinances, attached is a projection of the principal and interest costs on the bonds proposed to be authorized by the following loan orders under

Attachment: Order for Hoover Roof funding authorization (ORDER-2023-28 : Hoover School Roof Replacement)

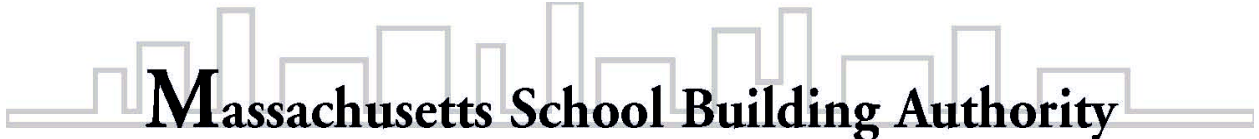
consideration by the City Council. The payment schedule attached assumes a 30-year borrowing term, an interest rate assumption of 5.5% over the life of the borrowing, and a level debt service payment schedule. The debt service on these bonds will not be paid from an enterprise fund and will have no impact on any enterprise fund rates."

FINANCIAL IMPACT: See attached

BOND DEBT SERVICE
City of Melrose, Massachusetts
Proposed \$2,306,449 Hoover Elementary School Roof Bonds
30 years - Level Debt Service
Interest Estimated and Subject to Change

	Dated Date Delivery Date		09/15/2023 09/15/2023		
Period Ending	Principal	Coupon	Interest	Debt Service	Annual Debt Service
03/15/2024	-	-	63,427.35	63,427.35	-
06/30/2024	-	-	-	-	63,427.35
09/15/2024	36,449.00	5.500%	63,427.35	99,876.35	-
03/15/2025	-	-	62,425.00	62,425.00	-
06/30/2025	-	-	-	-	162,301.35
09/15/2025	30,000.00	5.500%	62,425.00	92,425.00	-
03/15/2026	-	-	61,600.00	61,600.00	-
06/30/2026	-	-	-	-	154,025.00
09/15/2026	35,000.00	5.500%	61,600.00	96,600.00	-
03/15/2027	-	-	60,637.50	60,637.50	-
06/30/2027	-	-	-	-	157,237.50
09/15/2027	35,000.00	5.500%	60,637.50	95,637.50	-
03/15/2028	-	-	59,675.00	59,675.00	-
06/30/2028	-	-	-	-	155,312.50
09/15/2028	40,000.00	5.500%	59,675.00	99,675.00	-
03/15/2029	-	-	58,575.00	58,575.00	-
06/30/2029	-	-	-	-	158,250.00
09/15/2029	40,000.00	5.500%	58,575.00	98,575.00	-
03/15/2030	-	-	57,475.00	57,475.00	-
06/30/2030	-	-	-	-	156,050.00
09/15/2030	45,000.00	5.500%	57,475.00	102,475.00	-
03/15/2031	-	-	56,237.50	56,237.50	-
06/30/2031	-	-	-	-	158,712.50
09/15/2031	45,000.00	5.500%	56,237.50	101,237.50	-
03/15/2032	-	-	55,000.00	55,000.00	-
06/30/2032	-	-	-	-	156,237.50
09/15/2032	50,000.00	5.500%	55,000.00	105,000.00	-
03/15/2033	-	-	53,625.00	53,625.00	-
06/30/2033	-	-	-	-	158,625.00
09/15/2033	50,000.00	5.500%	53,625.00	103,625.00	-
03/15/2034	-	-	52,250.00	52,250.00	-
06/30/2034	-	-	-	-	155,875.00
09/15/2034	55,000.00	5.500%	52,250.00	107,250.00	-
03/15/2035	-	-	50,737.50	50,737.50	-
06/30/2035	-	-	-	-	157,987.50
09/15/2035	55,000.00	5.500%	50,737.50	105,737.50	-
03/15/2036	-	-	49,225.00	49,225.00	-
06/30/2036	-	-	-	-	154,962.50
09/15/2036	60,000.00	5.500%	49,225.00	109,225.00	-
03/15/2037	-	-	47,575.00	47,575.00	-
06/30/2037	-	-	-	-	156,800.00
09/15/2037	65,000.00	5.500%	47,575.00	112,575.00	-
03/15/2038	-	-	45,787.50	45,787.50	-
06/30/2038	-	-	-	-	158,362.50
09/15/2038	65,000.00	5.500%	45,787.50	110,787.50	-
03/15/2039	-	-	44,000.00	44,000.00	-
06/30/2039	-	-	-	-	154,787.50
09/15/2039	70,000.00	5.500%	44,000.00	114,000.00	-
03/15/2040	-	-	42,075.00	42,075.00	-
06/30/2040	-	-	-	-	156,075.00
09/15/2040	75,000.00	5.500%	42,075.00	117,075.00	-
03/15/2041	-	-	40,012.50	40,012.50	-
06/30/2041	-	-	-	-	157,087.50
09/15/2041	80,000.00	5.500%	40,012.50	120,012.50	-
03/15/2042	-	-	37,812.50	37,812.50	-
06/30/2042	-	-	-	-	157,825.00
09/15/2042	85,000.00	5.500%	37,812.50	122,812.50	-
03/15/2043	-	-	35,475.00	35,475.00	-
06/30/2043	-	-	-	-	158,287.50
09/15/2043	90,000.00	5.500%	35,475.00	125,475.00	-
03/15/2044	-	-	33,000.00	33,000.00	-
06/30/2044	-	-	-	-	158,475.00
09/15/2044	90,000.00	5.500%	33,000.00	123,000.00	-
03/15/2045	-	-	30,525.00	30,525.00	-
06/30/2045	-	-	-	-	153,525.00
09/15/2045	100,000.00	5.500%	30,525.00	130,525.00	-
03/15/2046	-	-	27,775.00	27,775.00	-
06/30/2046	-	-	-	-	158,300.00
09/15/2046	105,000.00	5.500%	27,775.00	132,775.00	-
03/15/2047	-	-	24,887.50	24,887.50	-
06/30/2047	-	-	-	-	157,662.50
09/15/2047	110,000.00	5.500%	24,887.50	134,887.50	-
03/15/2048	-	-	21,862.50	21,862.50	-
06/30/2048	-	-	-	-	156,750.00
09/15/2048	115,000.00	5.500%	21,862.50	136,862.50	-
03/15/2049	-	-	18,700.00	18,700.00	-
06/30/2049	-	-	-	-	155,362.50
09/15/2049	120,000.00	5.500%	18,700.00	138,700.00	-
03/15/2050	-	-	15,400.00	15,400.00	-
06/30/2050	-	-	-	-	154,100.00
09/15/2050	130,000.00	5.500%	15,400.00	145,400.00	-
03/15/2051	-	-	11,825.00	11,825.00	-
06/30/2051	-	-	-	-	157,225.00
09/15/2051	135,000.00	5.500%	11,825.00	146,825.00	-
03/15/2052	-	-	8,112.50	8,112.50	-
06/30/2052	-	-	-	-	154,937.50
09/15/2052	145,000.00	5.500%	8,112.50	153,112.50	-
03/15/2053	-	-	4,125.00	4,125.00	-
06/30/2053	-	-	-	-	157,237.50
09/15/2053	150,000.00	5.500%	4,125.00	154,125.00	-
06/30/2054	-	-	-	-	154,125.00
	2,306,449.00		2,459,679.70	4,766,128.70	4,766,128.70

Attachment: Order for Hoover Roof funding authorization (ORDER-2023-28 : Hoover School Roof Replacement)



Massachusetts School Building Authority

Deborah B. Goldberg
Chairman, State Treasurer

James A. MacDonald
Chief Executive Officer

John K. McCarthy
Executive Director / Deputy CEO

August 31, 2022

The Honorable Paul Brodeur, Mayor
City of Melrose
Melrose City Hall
562 Main Street
Melrose, MA 02176

Re: City of Melrose, Herbert Clark Hoover Elementary School, Horace Mann Elementary School

Dear Mayor Brodeur:

I am pleased to report that the Board of the Massachusetts School Building Authority (the “MSBA”) voted to approve the Proposed Accelerated Repair Project (the “Proposed Project”) in the City of Melrose (the “City”) for a roof replacement project at the Herbert Clark Hoover Elementary School, and a roof replacement project at the Horace Mann Elementary School.

The Board approved an Estimated Maximum Total Facilities Grant for each project as shown in the table below, which does not include any funds for potentially eligible Owner’s or Construction Contingency Expenditures. In the event that the MSBA determines that any Owner’s and/or Construction Contingency Expenditures are eligible for reimbursement, the Maximum Total Facilities Grant for the Herbert Clark Hoover Elementary School and Horace Mann Elementary School Projects may increase to each amount shown below. The final grant amounts will be determined by the MSBA based on a review and audit of all project costs incurred by the City, in accordance with the MSBA’s regulations, policies, and guidelines and the Project Funding Agreement. The final grant amount may be an amount less than the Estimated Maximum Total Facilities Grant.

Project Funding Agreement	Herbert Clark Hoover Elementary School	Horace Mann Elementary School
Estimated Maximum Total Facilities Grant	\$1,021,573	\$624,400
Maximum Total Facilities Grant	\$1,069,127	\$649,456

Pursuant to the terms of the MSBA’s Accelerated Repair Program, the City has 90 days to acquire and certify local approval for an appropriation and all other necessary local votes or approvals showing acceptance of the cost, site, type, scope and timeline for the Herbert Clark

Page 2
 August 31, 2022
 Melrose ARP PFA Board Action Letter

Hoover Elementary School and the Horace Mann Elementary School Projects. Upon receipt of the certified votes demonstrating local approval, the MSBA and the City will execute a Project Funding Agreement, which will set forth the terms and conditions pursuant to which the City will receive its grant from the MSBA. Once the Project Funding Agreement has been executed by both parties, the City will be eligible to submit requests for reimbursement for Proposed Project costs to the MSBA.

We will be contacting you soon to discuss these next steps in more detail, but in the meantime, I wanted to share with you the Board's approval of the Herbert Clark Hoover Elementary School and Horace Mann Elementary School Projects in the City of Melrose for a roof replacement project at the Herbert Clark Hoover Elementary School, and a roof replacement project at the Horace Mann Elementary School, and the Board's authorization to execute a Project Funding Agreement for these Proposed Projects.

Sincerely,



John K. McCarthy
 Executive Director

Cc: Legislative Delegation
 Christopher C. Cinella, President, Melrose City Council
 Denise M. Gaffey, Director of Planning and Community Development, City of Melrose
 Jen McAndrew, Chair, Melrose School Committee
 Dr. Julie Kukenberger, Superintendent, Melrose Public Schools
 Jon Lemieux, Owner's Project Manager, Vertex Companies, Inc.
 Joseph P. Viamari, Jr., Designer, Tighe & Bond, Inc.
 File: 10.2 Letters

Attachment: MSBA ARP Award Letter 8_31_2022 (ORDER-2023-28 : Hoover School Roof Replacement)

**EXHIBIT A
PROJECT BUDGET
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

City of Melrose
Herbert Clark Hoover Elementary School

8/24/2022

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Basis of Estimated Total Facilities Grant or Otherwise Ineligible	Basis of Estimated Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
Feasibility Study Agreement				
OPM Feasibility Study	\$7,500	\$0	\$7,500	
A&E Feasibility Study	\$49,100	\$0	\$49,100	
Env. & Site	\$0	\$0	\$0	
Other	\$0	\$0	\$0	
Feasibility Study Agreement Subtotal	\$56,600	\$0	\$56,600	\$27,909
Administration				
Legal Fees	\$0	\$0	\$0	\$0
Owner's Project Manager				
Design Development	\$0	\$0	\$0	
Construction Contract Documents	\$20,434	\$0	\$20,434	
Bidding	\$8,960	\$0	\$8,960	
Construction Contract Administration	\$101,045	\$0	\$101,045	
Closeout	\$12,558	\$0	\$12,558	
Extra Services	\$0	\$0	\$0	
Reimbursable & Other Services	\$5,000	\$0	\$5,000	
Cost Estimates	\$0	\$0	\$0	
Advertising	\$0	\$0	\$0	
Permitting	\$0	\$0	\$0	
Owner's Insurance	\$0	\$0	\$0	
Other Administrative Costs	\$0	\$0	\$0	
Administration Subtotal	\$147,997	\$0	\$147,997	\$72,977
Architecture and Engineering				
Basic Services				
Design Development	\$0	\$0	\$0	
Construction Contract Documents	\$60,400	\$0	\$60,400	
Bidding	\$4,400	\$0	\$4,400	
Construction Contract Administration	\$34,600	\$0	\$34,600	
Closeout	\$3,600	\$0	\$3,600	
Other Basic Services	\$0	\$0	\$0	
Basic Services Subtotal	\$103,000	\$0	\$103,000	
Reimbursable Services				
Construction testing	\$0	\$0	\$0	
Printing (over minimum)	\$0	\$0	\$0	
Other Reimbursable Costs	\$0	\$0	\$0	
Hazardous Materials	\$10,700	\$0	\$10,700	
Geotech & Geo-Env.	\$0	\$0	\$0	
Site Survey	\$0	\$0	\$0	
Wetlands	\$0	\$0	\$0	
Traffic Studies	\$0	\$0	\$0	
Architectural/Engineering Subtotal	\$113,700	\$0	\$113,700	\$56,065
CM & Risk Preconstruction Services				
Pre-Construction Services	\$0	\$0	\$0	\$0
Site Acquisition				
Land/Building Purchase	\$0	\$0	\$0	
Appraisal Fees	\$0	\$0	\$0	
Recording fees	\$0	\$0	\$0	
Site Acquisition Subtotal	\$0	\$0	\$0	\$0
Construction Costs				
Construction Budget	\$0	\$0		
GMP Fee	\$0	\$0		
GMP Insurance	\$0	\$0		
GMP Contingency	\$0	\$0		
Division 1 - General Requirements	\$543,866	\$0		
Division 2 - Existing Conditions	\$340,900	\$0		
Division 3 - Concrete	\$0	\$0		
Division 4 - Masonry	\$16,200	\$0		
Division 5 - Metals	\$157,086	\$0		
Division 6 - Woods, Plastics and Composites	\$28,464	\$0		
Division 7 - Thermal and Moisture Protection	\$654,165	\$127,577		
Division 8 - Openings	\$0	\$0		
Division 9 - Finishes	\$0	\$0		
Division 10 - Specialties	\$0	\$0		
Division 11 - Equipment	\$0	\$0		
Division 12 - Furnishings	\$0	\$0		
Division 13 - Special Construction	\$0	\$0		
Division 14 - Conveying Systems	\$0	\$0		
Division 21 - Fire Suppression	\$0	\$0		
Division 22 - Plumbing	\$32,685	\$0		
Division 23 - HVAC	\$63,526	\$0		
Division 25 - Integrated Automation	\$0	\$0		
Division 26 - Electrical	\$44,124	\$0		
Division 27 - Communications	\$0	\$0		
Division 28 - Electronic Safety and Security	\$0	\$0		
Division 31 - Earthwork	\$0	\$0		
Division 32 - Exterior Improvements	\$0	\$0		
Division 33 - Utilities	\$0	\$0		
Construction Budget	\$1,881,016	\$127,577	\$1,753,439	\$864,621
Alternates				
	\$0	\$0	\$0	
	\$0	\$0	\$0	
	\$0	\$0	\$0	
Alternates Subtotal	\$0	\$0	\$0	\$0
Miscellaneous Project Costs				
Utility company Fees	\$0	\$0	\$0	
Testing Services	\$0	\$0	\$0	
Swing Space/Modulars	\$0	\$0	\$0	
Other Project Costs (Mailing & Moving)	\$0	\$0	\$0	
Misc. Project Costs Subtotal	\$0	\$0	\$0	\$0

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

City of Melrose
Herbert Clark Hoover Elementary School

8/24/2022

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Basis of Estimated Total Facilities Grant or Otherwise Ineligible	Basis of Estimated Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
<i>Furnishings and Equipment</i>				
<i>Furnishings</i>	\$0	\$0	\$0	
<i>Equipment</i>	\$0	\$0	\$0	
<i>Computer Equipment</i>	\$0	\$0	\$0	
FF&E Subtotal	\$0	\$0	\$0	\$0
Soft Costs that exceed 20% of Const'n Cost		\$0	\$0	
Project Budget	\$2,199,313	\$127,577	\$2,071,736	\$1,021,573

Board Authorization	
Project Budget	\$2,199,313
Scope Items Excluded or Otherwise Ineligible	-\$127,577
Basis of Estimated Total Facilities Grant ¹	\$2,071,736
Reimbursement Rate	49.31%
Estimated Maximum Total Facilities Grant ¹	\$1,021,573

Total Construction Contingency ²	\$94,051
Ineligible Construction Contingency ²	\$6,379
Potentially Eligible Construction Contingency ²	\$87,672
Total Owner's Contingency ²	\$13,085
Ineligible Owner's Contingency ²	\$4,318
Potentially Eligible Owner's Contingency ²	\$8,767
Total Potentially Eligible Contingency ²	\$96,439
Reimbursement Rate	49.31%
Potential Additional Contingency Grant Funds ²	\$47,554
Maximum Total Facilities Grant	\$1,069,127
Total Project Budget	\$2,306,449

This document was prepared by the MSBA based on a preliminary review of information and estimates provided by the Owner's Project Manager of City of Melrose for the Herbert Clark Hoover Elementary School project. Based on this preliminary review, certain budget, cost and scope items have been determined to be ineligible for reimbursement, however, this document does not contain a final, exhaustive list of all budget, cost and scope items which may be ineligible for reimbursement by the MSBA. Nor is it intended to be a final determination of which budget, cost and scope items may be eligible for reimbursement by the MSBA. All project budget, cost and scope items shall be subject to review and audit by the Authority, and the Authority shall determine, in its sole discretion whether any such budget, cost and scope items are eligible for reimbursement. The MSBA may determine that certain additional budget, cost and scope items are ineligible for reimbursement.

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By signing this Total Project Budget, I hereby certify that I have read and understand the form and further certify, to the best of my knowledge and belief, that the information supplied by the District in the table above is true, accurate, and complete.

By:
Title: Chair of School Building Committee

Date: _____

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By:
Title: Superintendent of Schools

Date: _____

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Date: _____

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By:
Title: Chair of School Committee

Date: _____

City of Melrose
Horace Mann Elementary School

8/24/2022

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Basis of Estimated Total Facilities Grant or Otherwise Ineligible	Basis of Estimated Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
Feasibility Study Agreement				
OPM Feasibility Study	\$7,500	\$0	\$7,500	
A&E Feasibility Study	\$40,700	\$0	\$40,700	
Env. & Site	\$0	\$0	\$0	
Other	\$0	\$0	\$0	
Feasibility Study Agreement Subtotal	\$48,200	\$0	\$48,200	\$23,767
Administration				
Legal Fees	\$0	\$0	\$0	\$0
Owner's Project Manager				
Design Development	\$0	\$0	\$0	
Construction Contract Documents	\$20,434	\$0	\$20,434	
Bidding	\$8,960	\$0	\$8,960	
Construction Contract Administration	\$101,045	\$0	\$101,045	
Closeout	\$12,558	\$0	\$12,558	
Extra Services	\$0	\$0	\$0	
Reimbursable & Other Services	\$5,000	\$0	\$5,000	
Cost Estimates	\$0	\$0	\$0	
Advertising	\$0	\$0	\$0	
Permitting	\$0	\$0	\$0	
Owner's Insurance	\$0	\$0	\$0	
Other Administrative Costs	\$0	\$0	\$0	
Administration Subtotal	\$147,997	\$0	\$147,997	\$72,977
Architecture and Engineering				
Basic Services				
Design Development	\$0	\$0	\$0	
Construction Contract Documents	\$41,400	\$0	\$41,400	
Bidding	\$4,400	\$0	\$4,400	
Construction Contract Administration	\$28,800	\$0	\$28,800	
Closeout	\$3,600	\$0	\$3,600	
Other Basic Services	\$0	\$0	\$0	
Basic Services Subtotal	\$78,200	\$0	\$78,200	
Reimbursable Services				
Construction testing	\$0	\$0	\$0	
Printing (over minimum)	\$0	\$0	\$0	
Other Reimbursable Costs	\$0	\$0	\$0	
Hazardous Materials	\$5,400	\$0	\$5,400	
Geotech & Geo-Env.	\$0	\$0	\$0	
Site Survey	\$0	\$0	\$0	
Wetlands	\$0	\$0	\$0	
Traffic Studies	\$0	\$0	\$0	
Architectural/Engineering Subtotal	\$83,600	\$0	\$83,600	\$41,223
CM & Risk Preconstruction Services				
Pre-Construction Services	\$0	\$0	\$0	\$0
Site Acquisition				
Land/Building Purchase	\$0	\$0	\$0	
Appraisal Fees	\$0	\$0	\$0	
Recording fees	\$0	\$0	\$0	
Site Acquisition Subtotal	\$0	\$0	\$0	\$0
Construction Costs				
Construction Budget	\$0	\$0		
GMP Fee	\$0	\$0		
GMP Insurance	\$0	\$0		
GMP Contingency	\$0	\$0		
Division 1 - General Requirements	\$321,849	\$0		
Division 2 - Existing Conditions	\$212,272	\$0		
Division 3 - Concrete	\$0	\$0		
Division 4 - Masonry	\$0	\$0		
Division 5 - Metals	\$5,380	\$0		
Division 6 - Woods, Plastics and Composites	\$16,656	\$0		
Division 7 - Thermal and Moisture Protection	\$475,936	\$96,869		
Division 8 - Openings	\$0	\$0		
Division 9 - Finishes	\$0	\$0		
Division 10 - Specialties	\$0	\$0		
Division 11 - Equipment	\$0	\$0		
Division 12 - Furnishings	\$0	\$0		
Division 13 - Special Construction	\$0	\$0		
Division 14 - Conveying Systems	\$0	\$0		
Division 21 - Fire Suppression	\$0	\$0		
Division 22 - Plumbing	\$29,864	\$0		
Division 23 - HVAC	\$25,226	\$0		
Division 25 - Integrated Automation	\$0	\$0		
Division 26 - Electrical	\$25,960	\$0		
Division 27 - Communications	\$0	\$0		
Division 28 - Electronic Safety and Security	\$0	\$0		
Division 31 - Earthwork	\$0	\$0		
Division 32 - Exterior Improvements	\$0	\$0		
Division 33 - Utilities	\$0	\$0		
Construction Budget	\$1,113,143	\$96,869	\$1,016,274	\$501,125
Alternates				
	\$0	\$0	\$0	
	\$0	\$0	\$0	
	\$0	\$0	\$0	
Alternates Subtotal	\$0	\$0	\$0	\$0
Miscellaneous Project Costs				
Utility company Fees	\$0	\$0	\$0	
Testing Services	\$0	\$0	\$0	
Swing Space/Modulars	\$0	\$0	\$0	
Other Project Costs (Mailing & Moving)	\$0	\$0	\$0	
Misc. Project Costs Subtotal	\$0	\$0	\$0	\$0

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

City of Melrose
Horace Mann Elementary School

8/24/2022

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Basis of Estimated Total Facilities Grant or Otherwise Ineligible	Basis of Estimated Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
Furnishings and Equipment				
Furnishings	\$0	\$0	\$0	
Equipment	\$0	\$0	\$0	
Computer Equipment	\$0	\$0	\$0	
FF&E Subtotal	\$0	\$0	\$0	\$0
Soft Costs that exceed 20% of Const'n Cost		\$29,797	-\$29,797	
Project Budget	\$1,392,940	\$126,666	\$1,266,274	\$624,400

Board Authorization	
Project Budget	\$1,392,940
Scope Items Excluded or Otherwise Ineligible	-\$126,666
Basis of Estimated Total Facilities Grant ¹	\$1,266,274
Reimbursement Rate	49.31%
Estimated Maximum Total Facilities Grant ¹	\$624,400

Total Construction Contingency ²	\$55,657
Ineligible Construction Contingency ²	\$4,843
Potentially Eligible Construction Contingency ²	\$50,814
Total Owner's Contingency ²	\$11,580
Ineligible Owner's Contingency ²	\$11,580
Potentially Eligible Owner's Contingency ²	\$0
Total Potentially Eligible Contingency ²	\$50,814
Reimbursement Rate	49.31%
Potential Additional Contingency Grant Funds ²	\$25,056
Maximum Total Facilities Grant	\$649,456
Total Project Budget	\$1,460,177

This document was prepared by the MSBA based on a preliminary review of information and estimates provided by the Owner's Project Manager of City of Melrose for the Horace Mann Elementary School project. Based on this preliminary review, certain budget, cost and scope items have been determined to be ineligible for reimbursement, however, this document does not contain a final, exhaustive list of all budget, cost and scope items which may be ineligible for reimbursement by the MSBA. Nor is it intended to be a final determination of which budget, cost and scope items may be eligible for reimbursement by the MSBA. All project budget, cost and scope items shall be subject to review and audit by the Authority, and the Authority shall determine, in its sole discretion whether any such budget, cost and scope items are eligible for reimbursement. The MSBA may determine that certain additional budget, cost and scope items are ineligible for reimbursement.

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By: _____
Title: Chair of School Building Committee

Date: _____

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Title: Superintendent of Schools

Date: _____

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By: _____
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Date: _____

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By: _____
Title: Chair of School Committee

Date: _____

**EXHIBIT B
PROJECT SCOPE
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

Schematic Design Submission Checklist MSBA Accelerated Repair Program



District: Melrose Public Schools

School: Herbert Clark Hoover Elementary School

Scope: Roof Replacement

Schematic Design Deliverables:

OPM	District	
☒	☒	Project Narrative: - Existing conditions analysis (hazardous materials, structural, etc.) - Explanation of proposed solution - Designer statement that the proposed solution meets the Massachusetts Stretch Energy Code and/or the International Energy Conservation Code
☒	☒	Code Analysis
☒	☒	Schematic Design Drawings
☒	☒	Cost Estimate (CSI Format) - Include all Proposed Alternates
☒	☒	Form 3011 – Total Project Budget
☒	☒	Project Cash Flow (cumulative line chart illustrating Total Project Budget)
☒	☒	Project Schedule (Gantt Chart)
☒	☒	Accelerated Repair Program Reimbursement Rate Certification signed by the District
☒	☒	Proposed project scope and budget vote language in compliance with MSBA standard vote language

Schematic Design Submission Checklist MSBA Accelerated Repair Program



Program Guidelines and Project Funding Agreement:

OPM	District	
☒	☒	MSBA Board of Directors authorization to execute a Project Funding Agreement is tied to the specific project scope and budget presented in the Schematic Design.
☒	☒	The portion of the Construction Contingency potentially eligible for reimbursement is set at 5% of the total estimated eligible construction costs as included in the PFA's Total Project Budget and is intended for hard costs only. The MSBA will complete one Change Order review per district in which the MSBA will review Change Orders for eligibility not validity. All ineligible costs will not be reimbursed.
☒	☒	The portion of the Owner's Contingency potentially eligible for reimbursement is set at 0.5% of the total estimated eligible construction costs as included in the PFA's Total Project Budget and is intended for soft costs only. All ineligible costs will not be reimbursed.
☒	☒	Prior to securing project funding, the district will draft proposed project scope and budget vote language in compliance with MSBA standard vote language and will provide the vote language to the MSBA for review and approval prior to taking the vote.
☒	☒	After bids have been received and actual construction costs are established, the district's potential Project Funding Agreement must be revised to reflect the actual construction costs in accordance with paragraph 2.3 of the Project Funding Agreement. If there are bid savings, the MSBA shares in the cost savings by reducing the maximum facilities grant to reflect reimbursable costs. If there is a bid overage, construction contingency is transferred to the construction budget to reflect the additional costs and is deemed ineligible. The transfer of construction contingency due to the bid overage results in a reduction to the maximum facilities grant.
☒	☒	MSBA's standardized Schedule of Values will be used by the district to ensure that all budget entries in the MSBA's ProPay system mirror the Total Project Budget Form 3011 following the PFA Bid Amendment. The MSBA will only reimburse eligible costs if they are entered to the correct cost codes in the Total Project Budget.
☒	☒	Budget Revision Requests will be submitted by the district in a timely manner to reflect changes to the Total Project Budget. After a Budget Revision Request is executed, the district will enter the Budget Revision Request into the ProPay system for approval by the MSBA.

Schematic Design Submission Checklist MSBA Accelerated Repair Program



☒	☒	MSBA's Audit Department will review requests for reimbursement in the ProPay system of \$50,000 or more. All reimbursement requests which are less than \$50,000 will be returned to the district without review. All districts are encouraged to attend ProPay training conducted by the Audit Department following the execution of a Project Funding Agreement.
☒	☒	OPM monthly reporting begins when the OPM contract is executed and continues until the project receives Board of Directors approval of the final audit. Failure to submit timely and complete reports may impact district reimbursement review and payment. OPM monthly reporting supports MSBA review of reimbursement requests.

I certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that I have fulfilled all requirements described in Section 8.2 of the MSBA Standard Contract for Project Management Services (Accelerated Repair Program) by submitting the listed deliverables by the established deadline to the MSBA. I further certify, as evidenced by the boxes set forth under the heading, "Program Guidelines and Project Funding Agreement," which I have checked above, that I have explained the Program Guidelines and Project Funding Agreement to the district.

I understand that if a conflict is created between this form and the Project Funding Agreement, the Project Funding Agreement is the controlling document. I also understand that if a conflict is created between this form and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program), the MSBA Standard Contract is the controlling document. I further recognize that the purpose of this form is to further understand the Project Funding Agreement and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program).

Title: Project Director, Owner's Project Manager

Firm: The Vertex Companies, LLC

Date: June 27, 2022

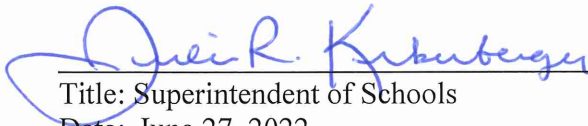
I certify, as evidenced by the boxes set forth under the heading, "Program Guidelines and Project Funding Agreement," which I have checked above, that I have read and understand the Program Guidelines and Project Funding Agreement. I certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that I have reviewed the enumerated deliverables within the Schematic Design Submittal with the Owner's Project Manager and Designer. I further

Schematic Design Submission Checklist MSBA Accelerated Repair Program



certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that the OPM has explained to me the OPM's responsibilities as described in Section 8.2 of the MSBA Standard Contract for Project Management Services (Accelerated Repair Program) to submit the designer's deliverables listed above.

I understand that if a conflict is created between this form and the Project Funding Agreement, the Project Funding Agreement is the controlling document. I also understand that if a conflict is created between this form and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program), the MSBA Standard Contract is the controlling document. I further recognize that the purpose of this form is to further understand the Project Funding Agreement and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program).


Title: Superintendent of Schools
Date: June 27, 2022

Section 1

Project Narrative

1.1 Introduction

The City of Melrose is currently participating in the Massachusetts School Building Authority (MSBA) Accelerated Repair Program (ARP) and has submitted a Statement of Interest for repairs at the Herbert Clark Hoover School. The Vertex Companies, LLC and Tighe & Bond, Inc. were subsequently designated as the Owner's Project Manager (OPM) and Designer, respectively for the proposed project.

The Herbert Clark Hoover School is located at 37 Glendower Road in Melrose, MA. The school building is a two-story brick masonry building with an approximate roof area of 18,000 square feet, which was constructed in 1964. The school has undergone several renovations over time, including a window and door replacement in 2015 and a prefabricated, wood-framed modular building addition in 2017. The first floor of the school generally consists of classrooms, storage rooms, a multipurpose room, a teacher's lounge, administrative and nurse offices, a library, bathrooms, and a boiler room. The second floor contains classrooms and bathrooms. The school currently serves approximately 300 students from kindergarten to fifth grade.

The team assembled for execution of the Herbert Clark Hoover School project includes the following members:

- | | |
|----------------------------------|---|
| • Funding Agency | Massachusetts School Building Authority |
| • Owner | Melrose Public Schools |
| • OPM | The Vertex Companies, LLC |
| • Designer | Tighe & Bond Designer Services, Inc. |
| • Cost Estimating | Ellana Construction Consultants. |
| • Hazardous Materials Assessment | Tighe & Bond Designer Services, Inc. |
| • Code Review | Tighe & Bond Designer Services, Inc. |
| • Structural/Construction Admin | Frawley Engineering, P.C. |

1.2 Existing Conditions

1.2.1 Roof

The existing Ethylene Propylene Diene Monomer (EPDM) roof system was constructed over an original coal tar pitch and gravel built up roof. Based on documents provided by the District, the original roof on the 1964 area consisted of 5 ply built-up coal tar pitch and gravel over 1.5" rigid insulation on a steel deck. Based on recent site visits and field investigation, ½" fiberboard and EPDM membrane were installed over the original roof system. The largest portion of the roof area is ballasted with gravel, while several smaller sections are fully adhered.

There is significant evidence of water damage inside the building from roof leaks and numerous deficiencies in the roofing membrane. The roof does not provide adequate thermal performance and drainage. Based on the site observations and investigation, the existing roofing system and majority of associated appurtenances appear to be in poor condition and are beyond their useful life.



Photo 1: Roof Over Main Building



Photo 2: Roof Over Lower Building

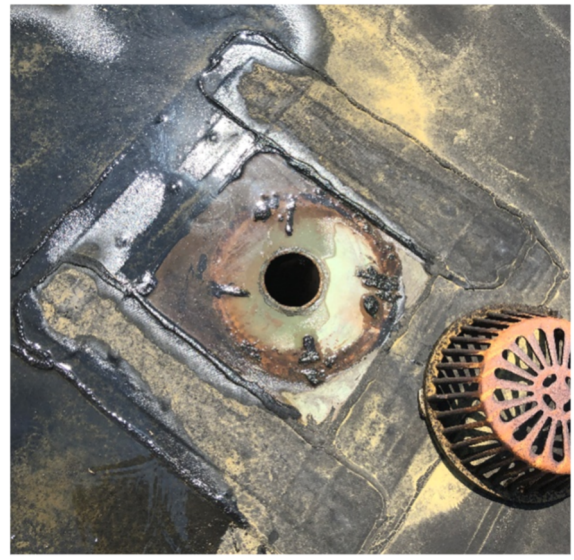
The modular addition constructed in 2017 consists of a single ply membrane roofing system and is not included as part of this project.

1.2.2 Plumbing

There are existing roof drains that are tied into the storm drainage system in the building. The drains appear to be in working order, however some are rusted and in poor condition.

One storm leader exits the building and runs above a sub-roof near the main entrance toward a vertical storm leader tied into the underground storm drainage system.

Plumbing vents penetrate the roof in multiple locations to provide pressure relief for the school's sanitary piping system. The vent piping is in good condition with expected rust on the pipe interior.

**Photo 3:** Roof Drain**Photo 4:** Roof Drain**Photo 5:** Storm Leader Routed on Roof

1.2.3 HVAC

There are seven exhaust fans (EFs) installed on the main building's roof and rooftop air handling units are located on the temporary addition, which is not part of this project.

Most of the exhaust fans appear original and are well beyond the 15-25-year life expectancy. One exhaust fan, identified as “#6” on the 1964 drawings, has been replaced and appears that it can be re-used.



Photo 6: HVAC Equipment on Main Roof

1.2.4 Electrical

The existing electrical items on the roof are limited to electrical connections to HVAC equipment requiring electrical power. It is assumed that each HVAC fan has an integral or equipment-mounted disconnect. In addition, loose telecommunication cables run across the roof from the north wall to an entrance cap near the roof hatch.

1.3 Recommended Solutions

1.3.1 Roof Replacement

Replacement of the existing roof system at the Herbert Clark Hoover School is recommended for improving thermal performance, roof drainage, overall energy efficiency of the building and remedying numerous roof leaks. The following items below outline the proposed scope of work for the project, including demolition. Schematic Design plans with additional detail are included in Appendix B.

Roof Demolition will include:

- Removal of the existing single-ply, adhered and ballasted EPDM membrane roofing systems
- Removal of existing built-up coal tar pitch and gravel roof system
- Removal of the existing rigid insulation
- Removal of the existing access hatch
- Repair of the steel roof deck as needed
- Removal and storage of existing HVAC equipment
- Removal of existing fascia, blocking, damaged curbing, and flashing

- Disposal of existing roofing materials as asbestos waste.

Proposed Roof Improvements will include:

- Repair of any damaged or compromised steel roof decking discovered during demolition
- Installation of a fully-adhered EPDM roofing system. The new roofing system will include, from bottom to top:
 - Fiberglass-reinforced gypsum sheathing cover board
 - Base sheet/ combination air and vapor barrier
 - New polyisocyanurate rigid insulation. The new insulation will meet the stretch energy code. Insulation thickness will provide a minimum R-value of 30. Tapered insulation will be installed to provide a positive pitch toward roof drains.
 - ½" coverboard installed over the insulation
 - Fully-adhered EPDM roofing membrane
- Installation of new curbing, blocking, flashing, metal fascia, and roof drains
- Installation of new access hatches and ladders

1.3.2 Plumbing Systems

Plumbing Demolition will include:

- Removal of all existing roof drains. Existing rain leaders within building will be cut and capped away from the drain body and prepared for reconnection.
- Removal of storm drain leader and it's supports located on the roof. Piping will be cut and capped at the edge of the roof and prepared for reconnection into the vertical storm leader.

Proposed Plumbing Improvements will include:

- Installation of new roof drains and associated piping. All new roof drains will be of the same type.
- Installation of 1" thick insulation on drain bodies and any new associated piping.
- Inspection of existing drainage piping, including snaking the pipes to check for clogs and jetting the pipes should there be any clogs present.
- Installation and rerouting of the new storm leader on the roof to the underground connection. New piping will be provided with supports.
- Extension of vent piping as required to maintain clearance above roof of 18-24".

1.3.3 HVAC Systems

HVAC Demolition will include:

- Disconnection, removal, and storage of roof fan #6.
- Curb for fan #6 to remain.
- Removal, and disposal of all other roof exhaust fans and curbs.
- Prior to unit removal, exhaust fans will be tested and airflows recorded for final balancing efforts.
- Installation of temporary caps for all ductwork.
- Installation of temporary caps over fan #6 curb that is to remain.

HVAC Improvements will include:

- Replacement off all roof exhaust fans, except #6. Replace fans in kind based on original design drawing schedules.
- Installing new curbs for new exhaust fans, including transition curbs as required for fan connection to existing roof opening.
- Repairing curbs and/or blocking and extending existing curb as required to minimum of 12" above new roof for remaining fan.
- Installation of new Exhaust Fans with integral disconnects.
- Reinstallation of retained Exhaust Fan.
- Reconnecting and sealing units to existing ductwork.
- Connecting units to existing controls.
- Re-balancing systems to match pre-existing airflows.

1.3.4 Electrical Systems

The proposed electrical work will include:

- Disconnecting and making safe all existing electrical devices with connections to mechanical equipment. Once the existing equipment is placed back in its permanent location after roofing, the electrical connections will be re-energized. For any equipment that has moved, the existing conduit and wires will be extended as required.
- Installation of exterior weatherproof GFI receptacles and weatherproof luminaire will be located on the roof within 25'-0" of any exterior equipment per NEC. New receptacles and luminaire will be mounted to ¾" rigid galvanized steel or to an adjacent wall if possible.
- Removal and reconnection of telecommunication cable. Upon reconnection cables will be secured and rerouted for safety.

1.4 ARP Sustainability Requirements

MSBA's ARP requires use of the Stretch Energy Code (780 CMR – Appendix AA and 2018 IECC) as the basis of design for ARP projects for roof replacement. Below is a table comparison of the required code values for the relevant project items and the values for the proposed assemblies. The proposed solutions and items for the Herbert Clark Hoover School meet or exceed the ARP sustainability requirements.

Roofs	Maximum U-Value (Btu/hr·ft ² ·°F)	Minimum R-Value (°F·ft ² ·hr/Btu)
Required	0.032	30
Proposed	0.032	30

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Herbert Clark Hoover School Repairs Project

Building Code Analysis

This analysis summarizes codes requirements applicable to the project scope for the Herbert Clark Hoover School Repairs Project. This summary includes general code information applicable to the overall project and more specific requirements related to roof replacement activities.

Applicable codes for this project include:

- International Building Code 2015 (IBC)
- International Existing Building Code 2015 (IEBC)
- International Energy Conservation Code 2018 (IECC)
- 248 CMR 10.00 Uniform State Plumbing Code (2017)
- Commonwealth of Massachusetts State Building Code, Ninth edition 780 CMR (including amendments to the IBC, IECC and IEBC)
- Massachusetts Stretch Energy Code 780 Appendix AA
- Architectural Access Board Regulations 521 CMR (AAB)
- American Society of Civil Engineers – Minimum Design Loads for Buildings and Other Structures (ASCE 7-05)
- National Electrical Code NFPA 70

Section 1 – General Code

Use and Occupancy Classification (305 IBC 2015 & 780 CMR)

- Educational (E)
 - Due to the anticipated scope of work, roof replacement, Level 1 alterations of the IEBC will be triggered. Level 1 alterations encompass the removal and replacement of materials that serve the same purpose. Any new elements must comply with the requirements for new construction.

Types of Construction (602 IBC 2015 & 780 CMR)

- Type III Construction – Construction is that type of construction in which the exterior walls are of noncombustible materials and the interior building elements are of any material permitted by this code. Fire-retardant-treated wood framing complying with Section 2303.2 shall be permitted within exterior wall assemblies of a 2-hour rating or less.

Alterations Level 1 (503 IEBC 2015 & 780 CMR)

- Removal and replacement or the covering of existing materials, elements, or fixtures using new materials, elements, equipment, or fixtures that serve the same purpose.

Material and Methods (702.6 & Chapter 8 IEBC 2015 & 780 CMR)

- All new work shall comply with materials and methods requirements in the IBC, IEBC, IECC, IMC, and MSPC, as applicable that specify material standards, details of installation and connection, joints, penetrations, and continuity of any element, component, or system in the building.

Section 2 – Requirements Applicable to Roof Replacement Work**Building Envelope Requirements (IECC 2015, Table C402.3)**

- Roof Maximum U-Factors
 - Insulation entirely above deck – U-0.032
- Roof Minimum R-Values
 - Insulation entirely above deck – R-30

Massachusetts State Building Code (780 CMR Amendments)

- Dead loads on an existing roof may not increase by more than 5% due to a re-roofing project.
- If the additional dead loads exceed 5%, the structure must conform to current snow load requirements.
- Since a similar EPDM roofing system (and ballast in some locations) is being removed from the roof prior to roof replacement, the new roof system is not anticipated to increase the dead load on the roof by more than 5%.

Code of Federal Regulations Title 29 (29 CFR)

- Holes – each employee on walking/working surfaces shall be protected from falling through holes more than 6 feet above lower levels, by personal fall-arrest systems, covers, or guardrail systems erected around such holes.

Snow Drift Implications of Added Insulation (IECC 2015)

- 2015 IBC Code section 1608 pertains to current snow load requirements and requires use of ASCE 7. Increasing the insulation thickness on an existing roof requires the roof meet current Code requirements. The snow load requirements have snow drift loading requirements that, when calculated for the Herbert Clark Hoover School result in a potential area of overload extending 15 feet from the high wall sections of the roof.
- IECC Section C501.2 notes that this code shall not prevent the continued use and maintenance of an existing building lawfully in existence at the time of adoption of the code. Section C501.5 permits utilization of like materials for repairs, provided that hazards to life, health, or property are not created.
- IECC Section C503.1 states, Alterations shall not overload existing building systems and an exception to IECC requirements is provided for roof recovering projects. To prevent overloading of the existing building, existing insulation thickness will be maintained a distance of 15 feet from the high roof areas.

Uniform State Plumbing Code 248 CMR 10.00

- Storm Drain leaders are sized based on roof area served. The roof is broken up into six areas, which are served by 2", 3" and 4" roof drains. These roof drain can respectively capture storm water from 720sqft, 2200sqft and 4600sqft of roof area per 248 CMR 10.0. The roof drain sizes installed suffice for the school's roof. The new roof drains will use the same outlet size as the existing ones.

Section 4 – Accessibility Requirements

Existing Building (3.3 MAAB 521 CMR)

- Requirements for an accessible entry, toilet, drinking fountain, and telephone (if pay phones are provided) will be triggered based on the estimated cost of the project. A proponent is required to provide these items if the cost of a renovation project exceeds \$500,000.
- If the work costs less than \$100,000, then only the work being performed is required to comply with 521 CMR.
- Exception: Whether performed alone or in combination with each other, the following types of alterations are not subject to 521 CMR 3.3.1, unless the cost of work exceeds \$500,000 or unless work is being performed on the entrance or toilet room.
 - Curb cuts
 - Alteration work which is limited solely to electrical mechanical, or plumbing systems; to abatement of hazardous materials; or retrofit of automatic sprinklers and does not involve the alteration of any elements or spaces required to be accessible under 521 CMR. Where electrical outlets and controls are altered, they must comply with 521 CMR
 - Roof repair or replacement, window repair or replacement, repointing and masonry repair work
 - Work related to septic system repairs, site utilities and landscaping.
- If the cost of the project, and any additional renovations completed within 36 months of the project, exceeds 30% +of the full and fair cash value of the building, the entire building must be upgraded as required to meet 521 CMR requirements.
- The building currently complies with ADA/AAB requirements and accessibility upgrades will not be required as part of this project.

J:\M\M1215\026) Melrose\Design\Schematic Design\Herbert Clark\Building Code Analysis.docx

HOOVER ELEMENTARY SCHOOL

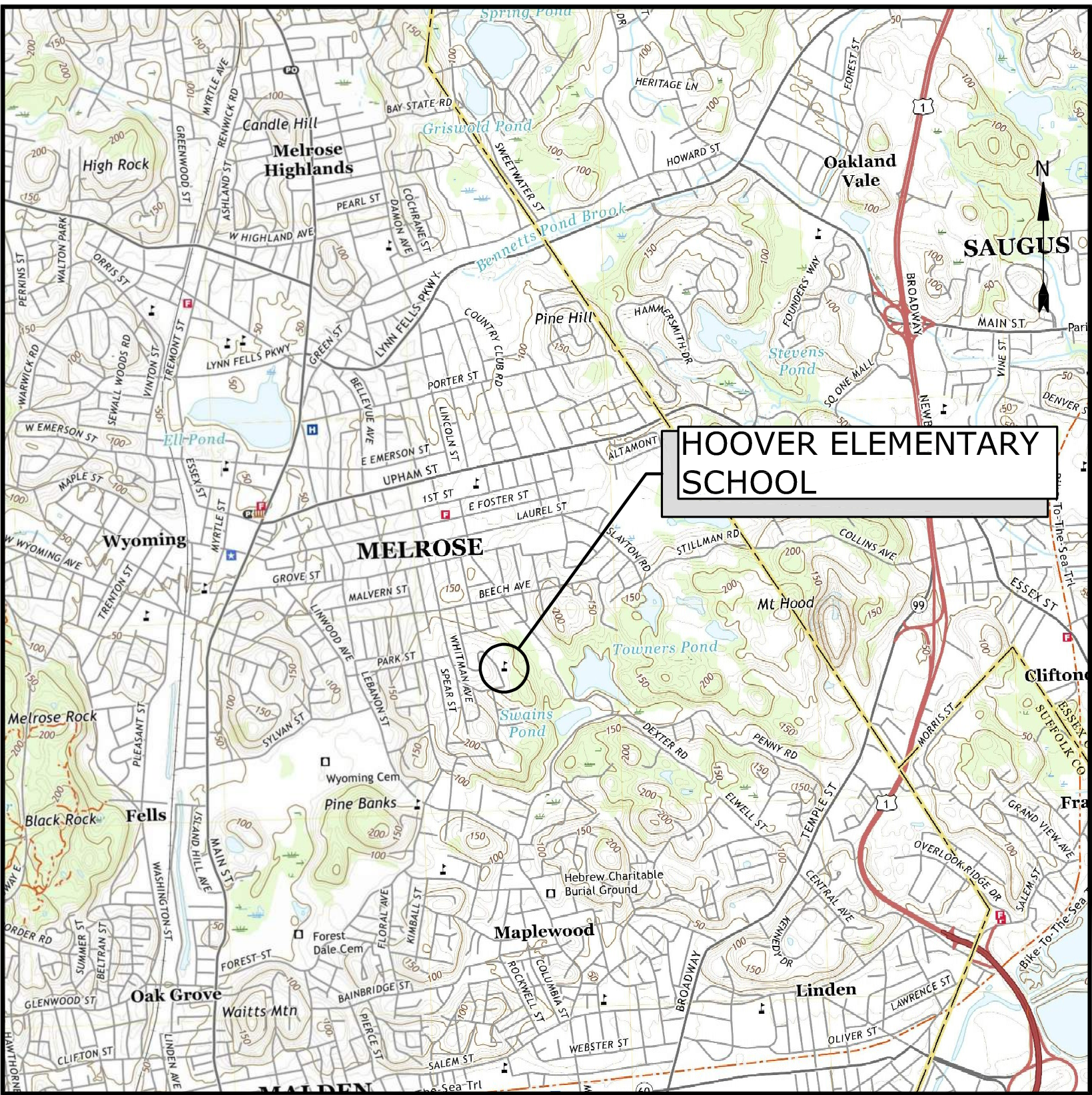
MSBA ACCELERATED REPAIR PROGRAM

ROOF REPLACEMENT PROJECT

MELROSE, MASSACHUSETTS

JUNE 2022

LIST OF DRAWINGS	
	COVER
G-001	ROOF PHOTOGRAPHS
AD-101	ROOF DEMOLITION PLAN
A-101	ROOF REPLACEMENT PLAN
A-501	ROOF DETAILS - 1
A-502	ROOF DETAILS - 2
P-101	PLUMBING ROOF PLAN
H-101	HVAC ROOF PLAN
E-101	ELECTRICAL ROOF PLAN



LOCATION MAP
SCALE: 1" = 2000'

PROJECT TEAM:

OWNER
CITY OF MELROSE
562 MAIN STREET
MELROSE, MA 02176

OWNER'S PROJECT MANAGER
THE VERTEX COMPANIES, INC.
400 LIBBEY PARKWAY
WEYMOUTH, MA 02189

COST ESTIMATING
ELLANA, INC.
98 NORTH WASHINGTON STREET
SUITE 109
BOSTON, MA 02114

FUNDING
MASSACHUSETTS SCHOOL
BUILDING AUTHORITY
40 BROAD STREET, SUITE 500
BOSTON, MA 02109

ENGINEER
TIGHE & BOND
DESIGNER SERVICES, INC.
53 SOUTHAMPTON ROAD
WESTFIELD, MA 01085

PREPARED BY:
Tighe&Bond

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION
COMPLETE SET 9 SHEETS

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Hoover
Elementary
School Roof
Replacement
Project

City Of Melrose

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - G-001.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		
ROOF PHOTOGRAPHS		
SCALE:		AS SHOWN
G-001		



ROOF OVER MAIN BUILDING
NO SCALE

A
-



ROOF EQUIPMENT ON
BALLAST ROOF
NO SCALE

B
-



EXISTING CHIMNEY
NO SCALE

C
-



ROOF ACCESS HATCH
NO SCALE

D
-



DRAIN ON LOWER ROOF
NO SCALE

E
-



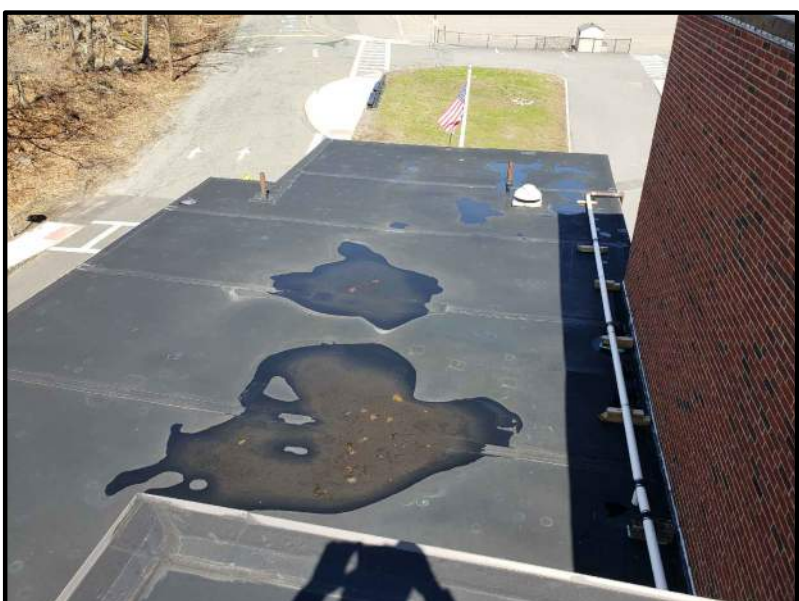
ROOF ON LOWER BUILDING
NO SCALE

F
-



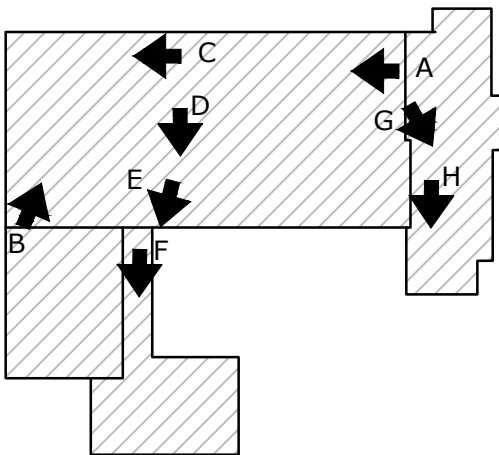
ROOF OVER LOWER BUILDING
NO SCALE

G
-



ROOF OVER LOWER
BUILDING
NO SCALE

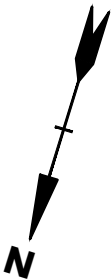
H
-



HOOVER KEYPLAN
NO SCALE

LEGEND:

← A PHOTOGRAPH LOCATION



City Of Melrose

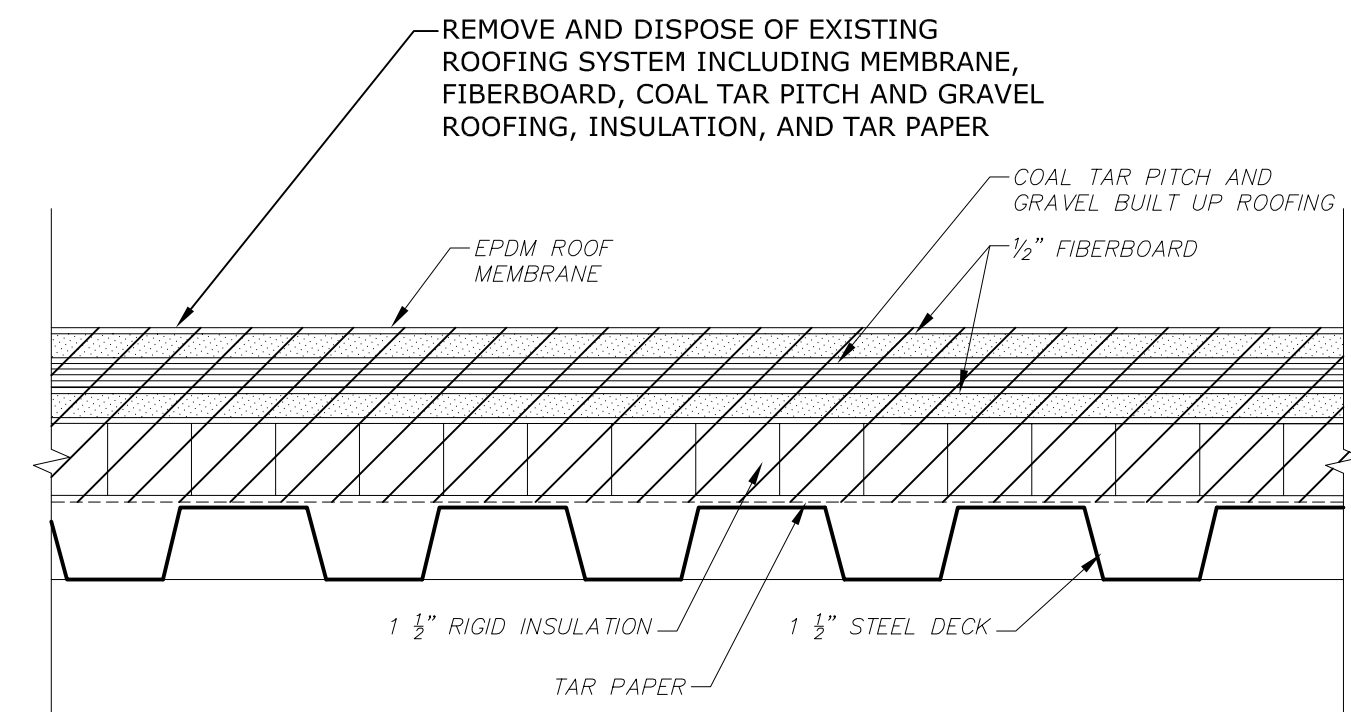
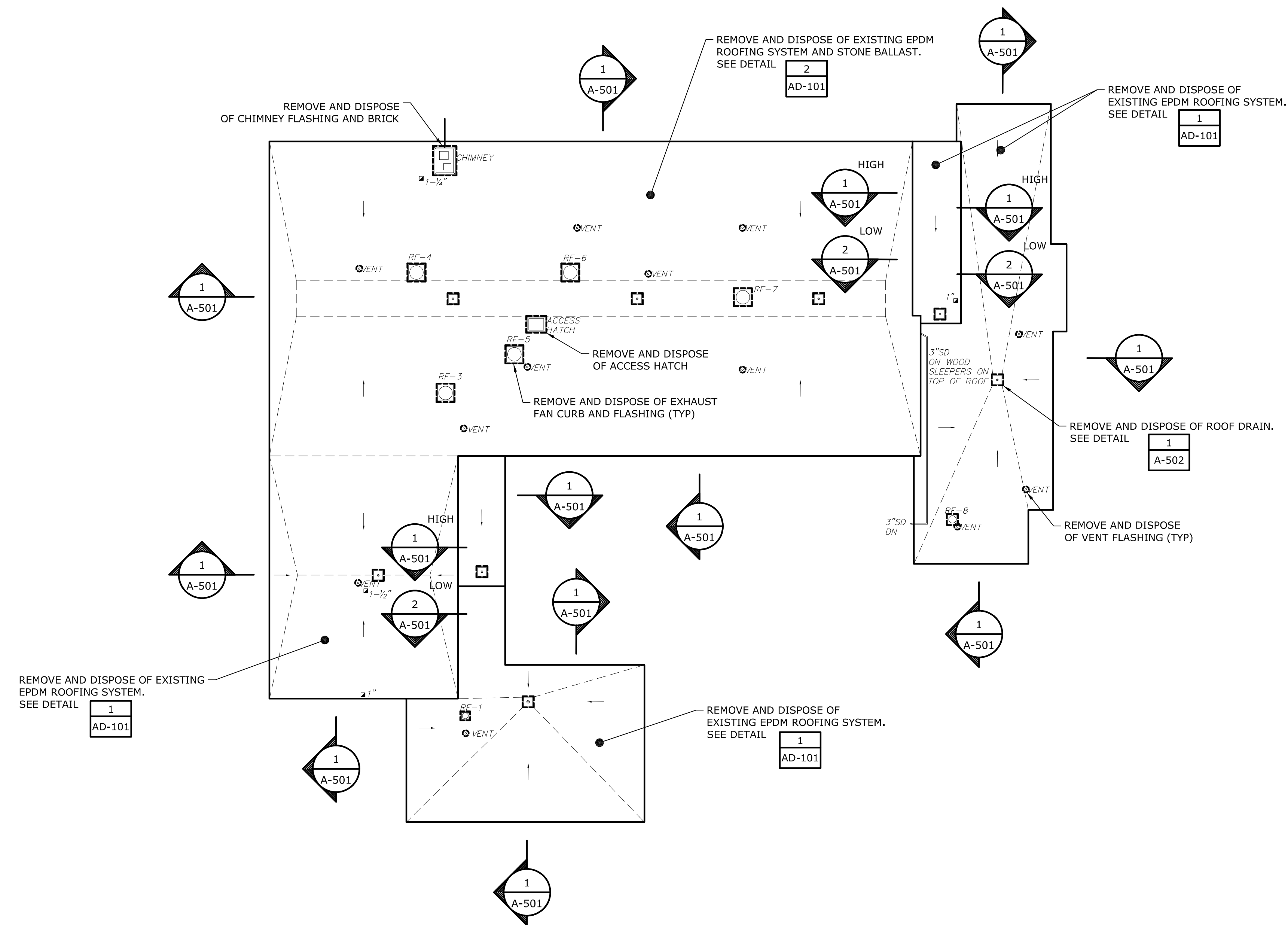
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - AD-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		

ROOF DEMOLITION PLAN

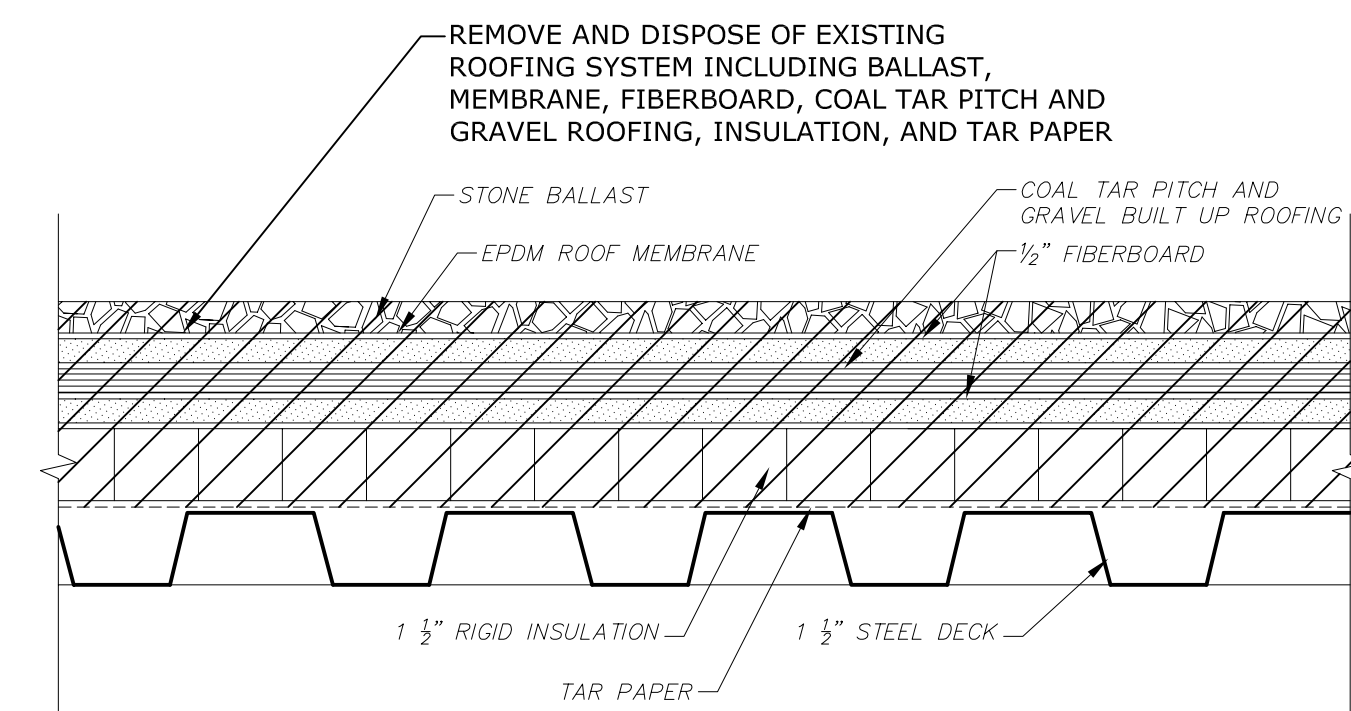
SCALE: 1/16"=1'-0"

AD-101



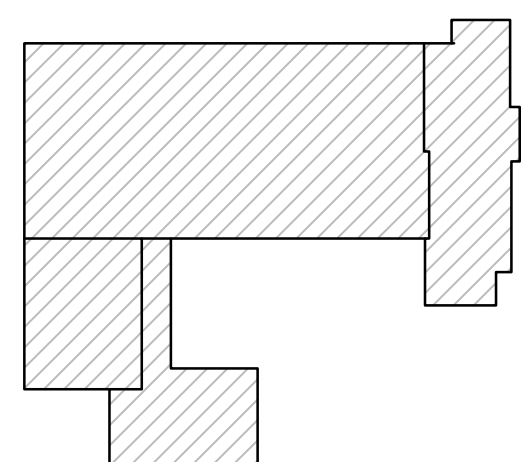
TYPICAL EXISTING UNBALLASTED ROOF SECTION

DETAIL	1
3" = 1'-0"	-

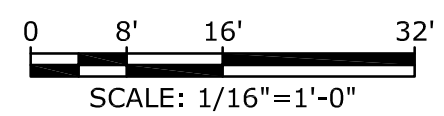


TYPICAL EXISTING BALLASTED ROOF SECTION

DETAIL	2
3" = 1'-0"	-



HOOVER KEYPLAN
NO SCALE



	ROOF DRAIN		EXISTING GOOSENECK (INTAKE OR EXHAUST)
	EXISTING VENT PIPE PENETRATION		EXISTING EXHAUST CAP OR AIR INTAKE
	EXISTING ROOFTOP EXHAUST FAN/DUCT WITH CURB		EXISTING CAPPED CURB
	EXISTING ROOFTOP EQUIPMENT ON SLEEPERS		EXISTING INSULATION THICKNESS TEST CUT
	GAS PIPE ON PIPE SUPPORT		EXISTING CANOPY LINE
			EXISTING ROOF SLOPE LINE
			ITEM TO BE REMOVED/DEMOLISHED

NOTES:

1. REMOVE AND DISPOSE OF ALL EXISTING HVAC EQUIPMENT CURBS.
2. SEE SHEET H-101 FOR HVAC EQUIPMENT REQUIREMENTS.

SCHEMATIC DESIGN
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Hoover
Elementary
School Roof
Replacement
Project

City Of Melrose

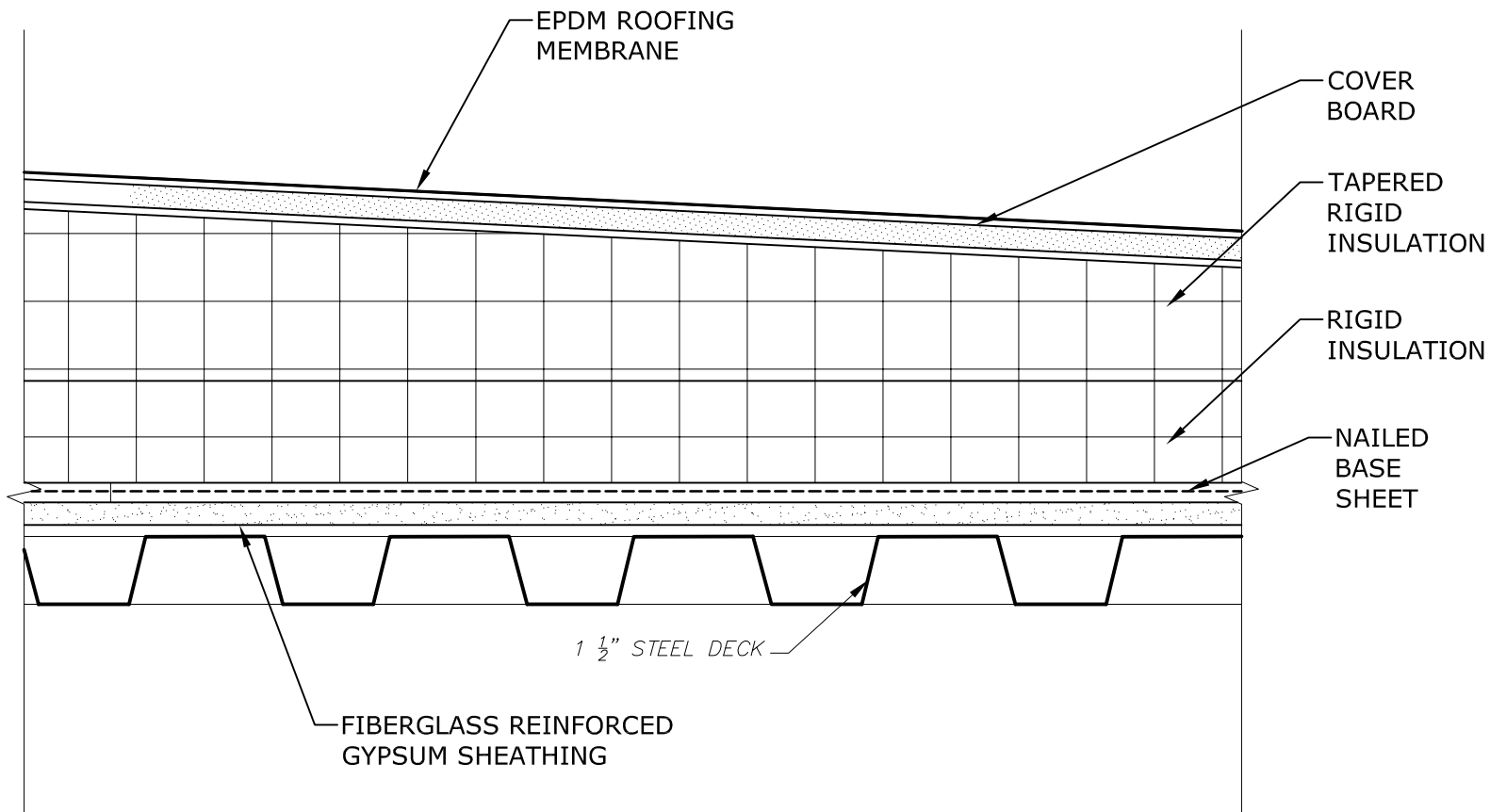
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
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DATE: 06/20/2022		
FILE: M1215-026-HOOVER - A-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: FJH, JPV		

ROOF PLAN

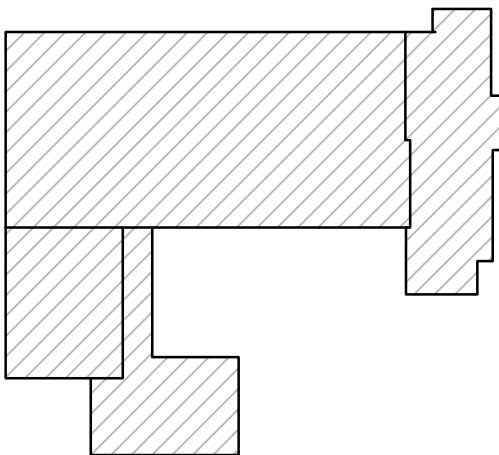
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A-101

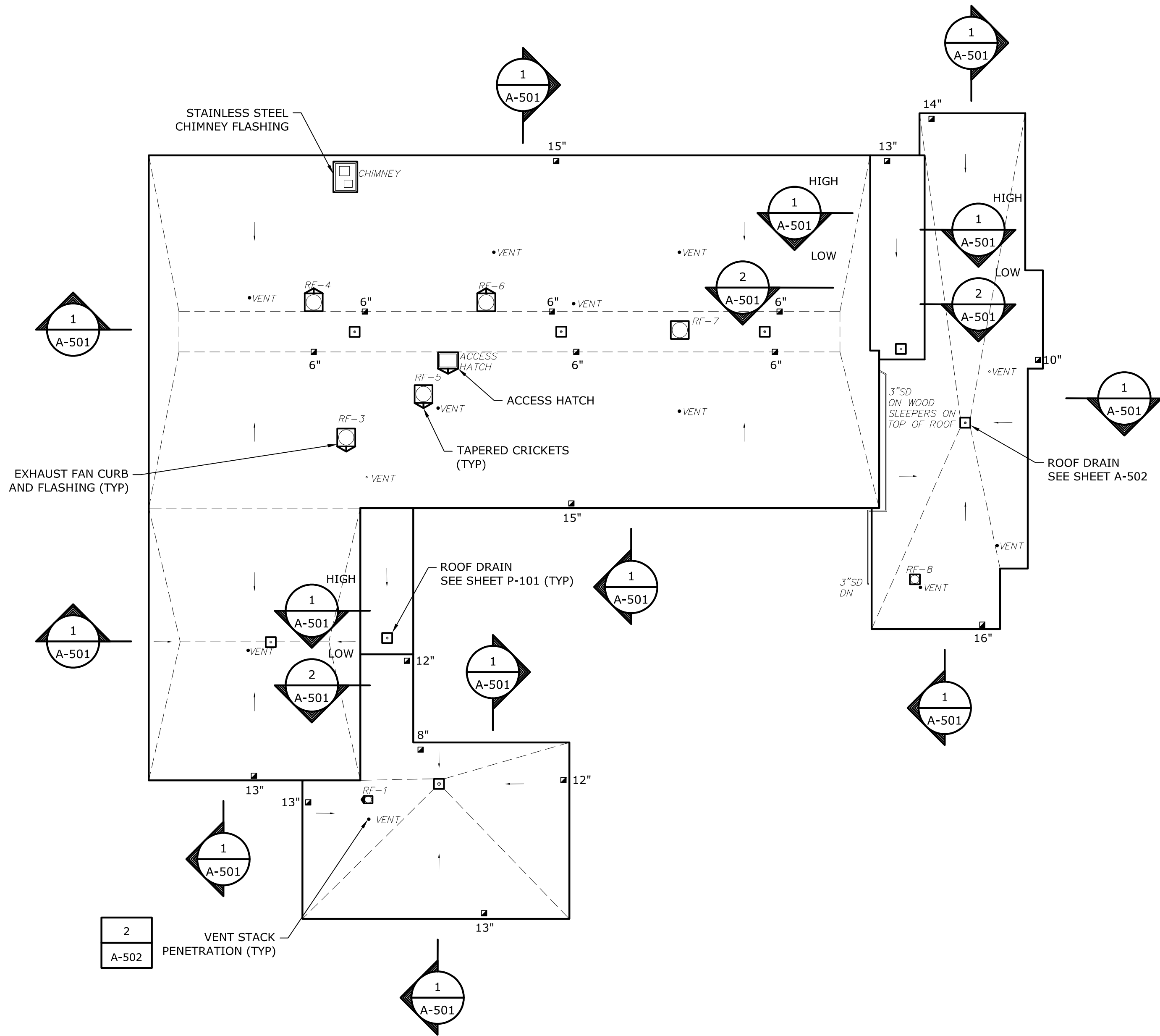
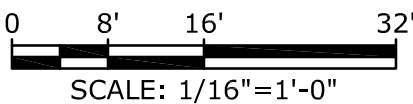


TYPICAL PROPOSED
ROOF SECTION

DETAIL	1
3" = 1'-0"	-



HOOVER KEYPLAN
NO SCALE



LEGEND

- ROOF DRAIN

VENT PIPE PENETRATION

ROOFTOP EXHAUST FAN/DUCT WITH CURB

ROOFTOP EQUIPMENT ON SLEEPERS

G — GAS PIPE ON PIPE SUPPORT
- GOOSENECK (INTAKE OR EXHAUST)

EXHAUST CAP OR AIR INTAKE

APPROXIMATE INSULATION THICKNESS

— — — — ROOF SLOPE LINE

— — — — GUARDRAIL FOR FALL PROTECTION

— — — — WALKPAD

— — — — ROOF SLOPE DIRECTION

NOTES:

1. INSTALL NEW CURBING FOR ALL HVAC EQUIPMENT. NEW CURBS MUST BE MINIMUM 12" ABOVE NEW ROOFING. INSTALL NEW CRICKETS TO ENSURE PROPER DRAINAGE AT ALL ROOF CURBS.
2. ADJUST ELEVATION OF ROOF EDGES TO MATCH THE MAXIMUM INSULATION THICKNESS AT EACH ROOF DECK ELEVATION TO PROVIDE A LEVEL ROOF PERIMETER.
3. ROOF SLOPE TO BE 1/8" PER FOOT MINIMUM UNLESS NOTED OTHERWISE.

SCHEMATIC DESIGN
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Hoover
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City Of Melrose

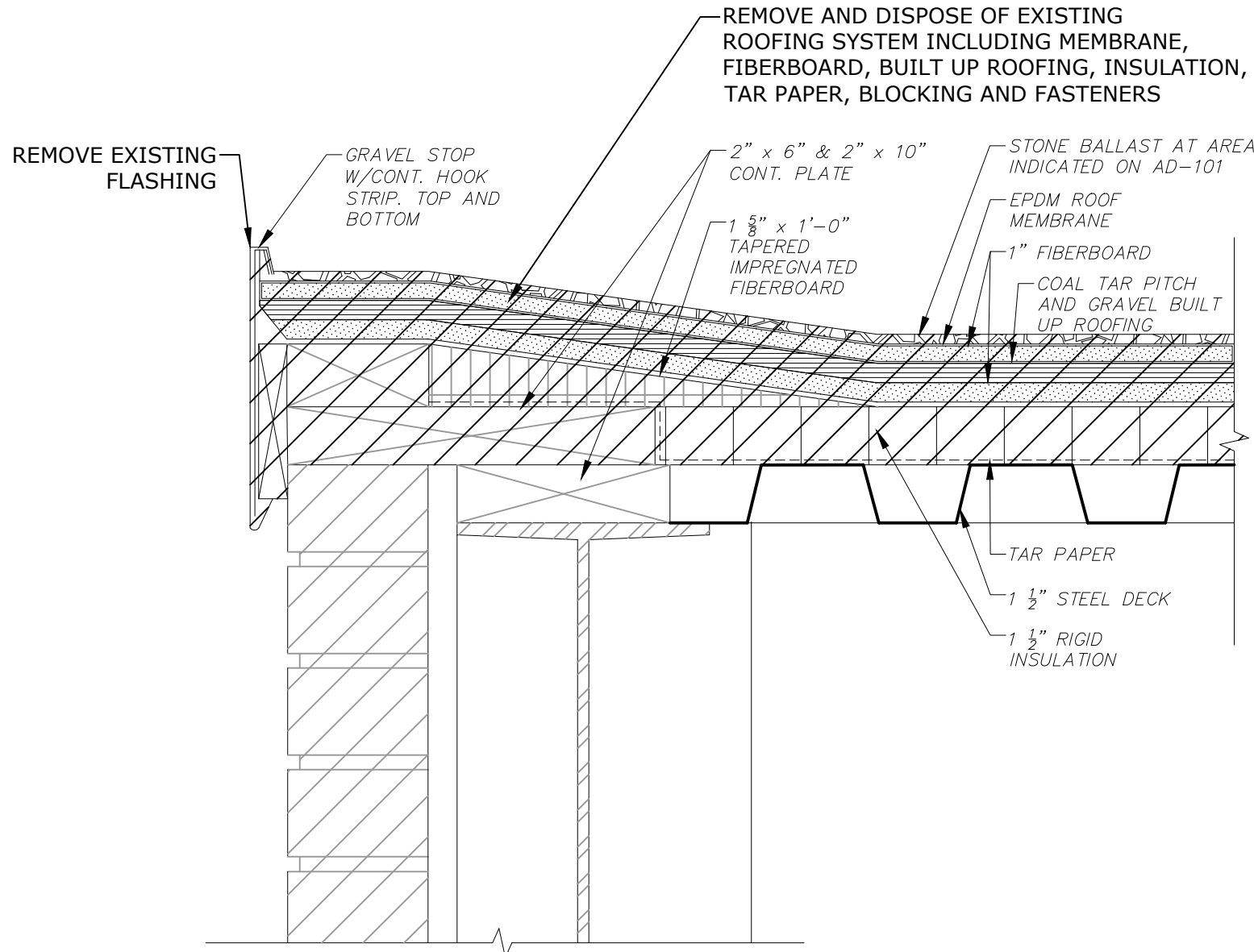
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - A-501.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		

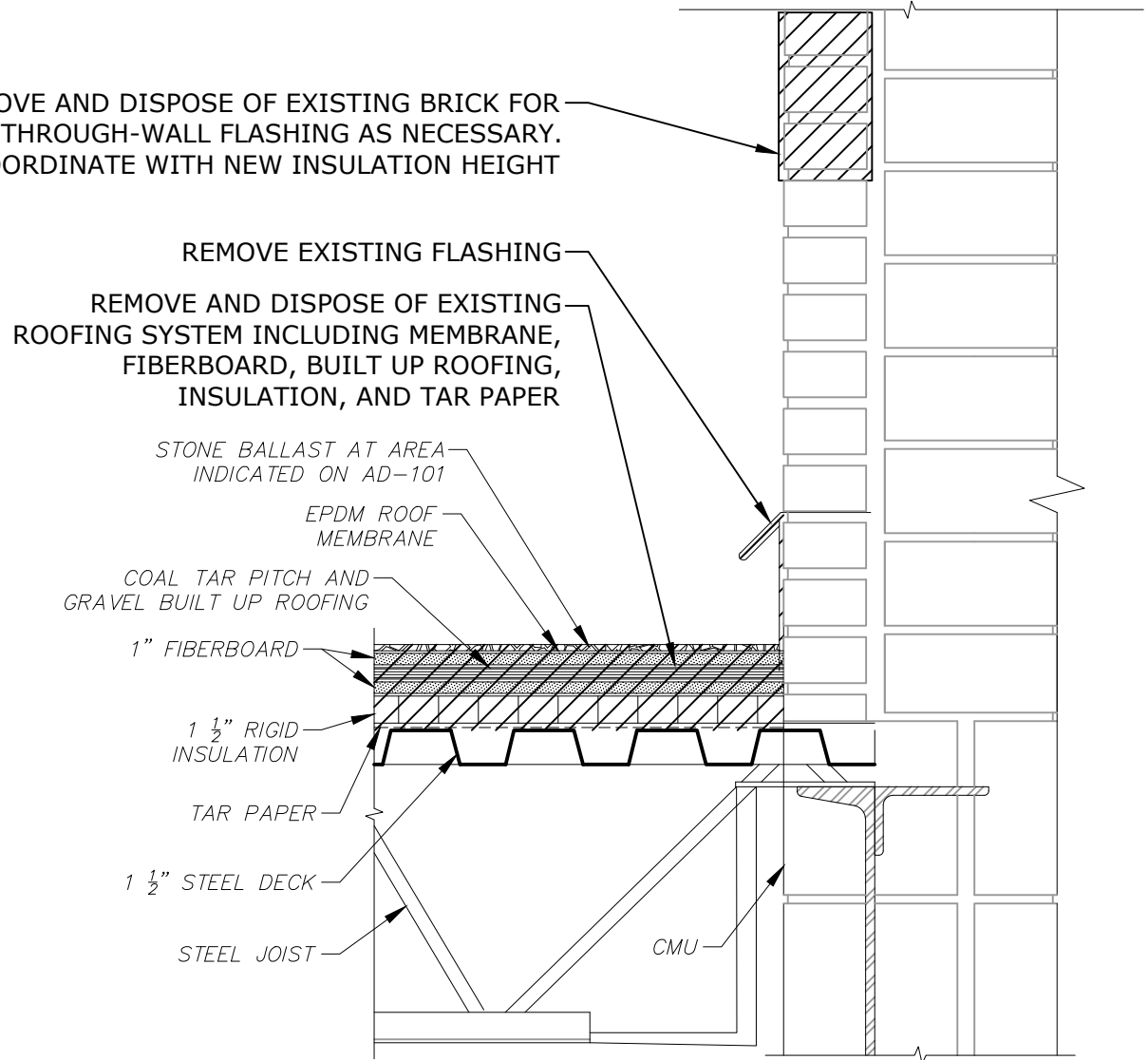
ROOF DETAILS - 1

SCALE: AS SHOWN

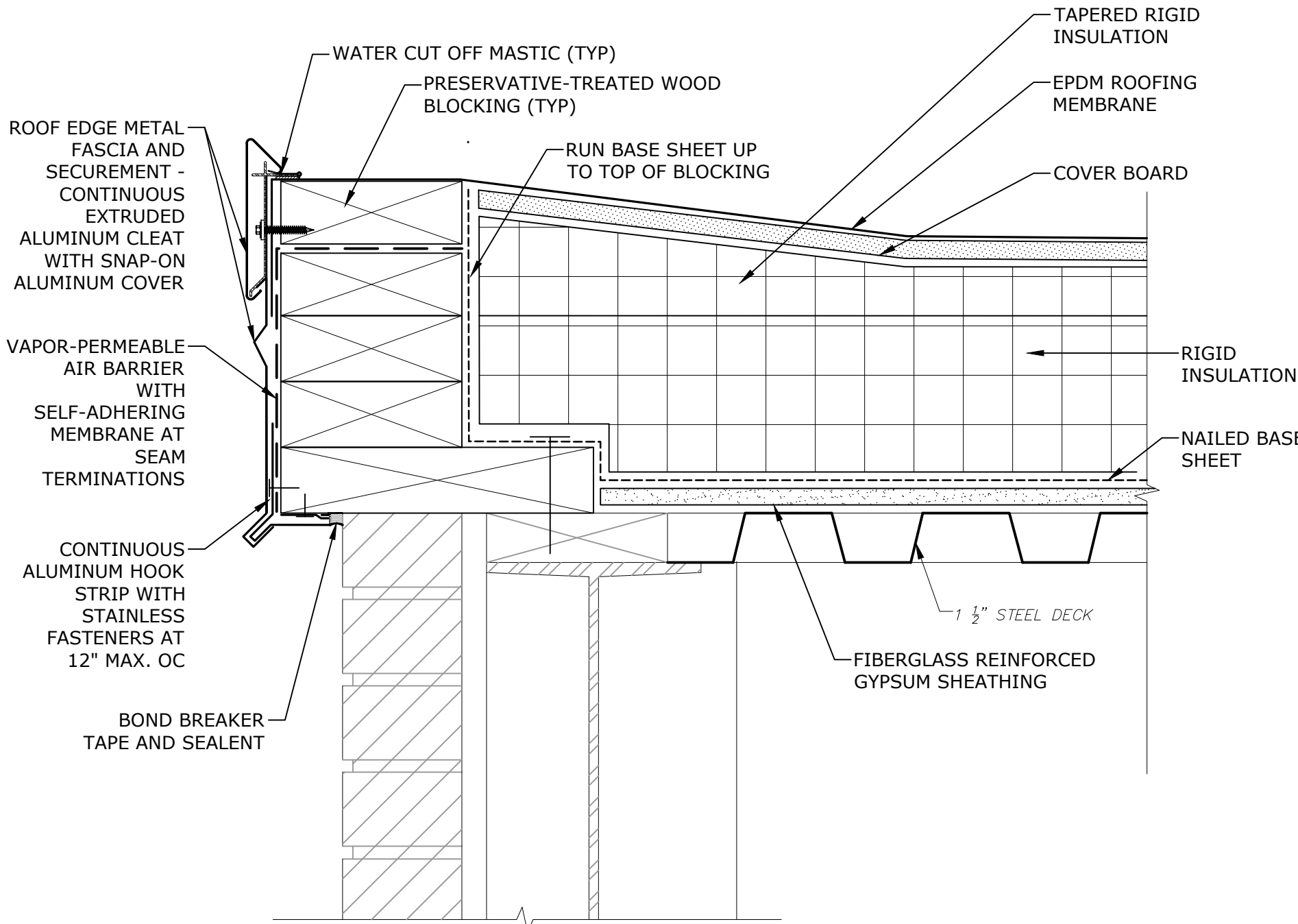
A-501



EXISTING



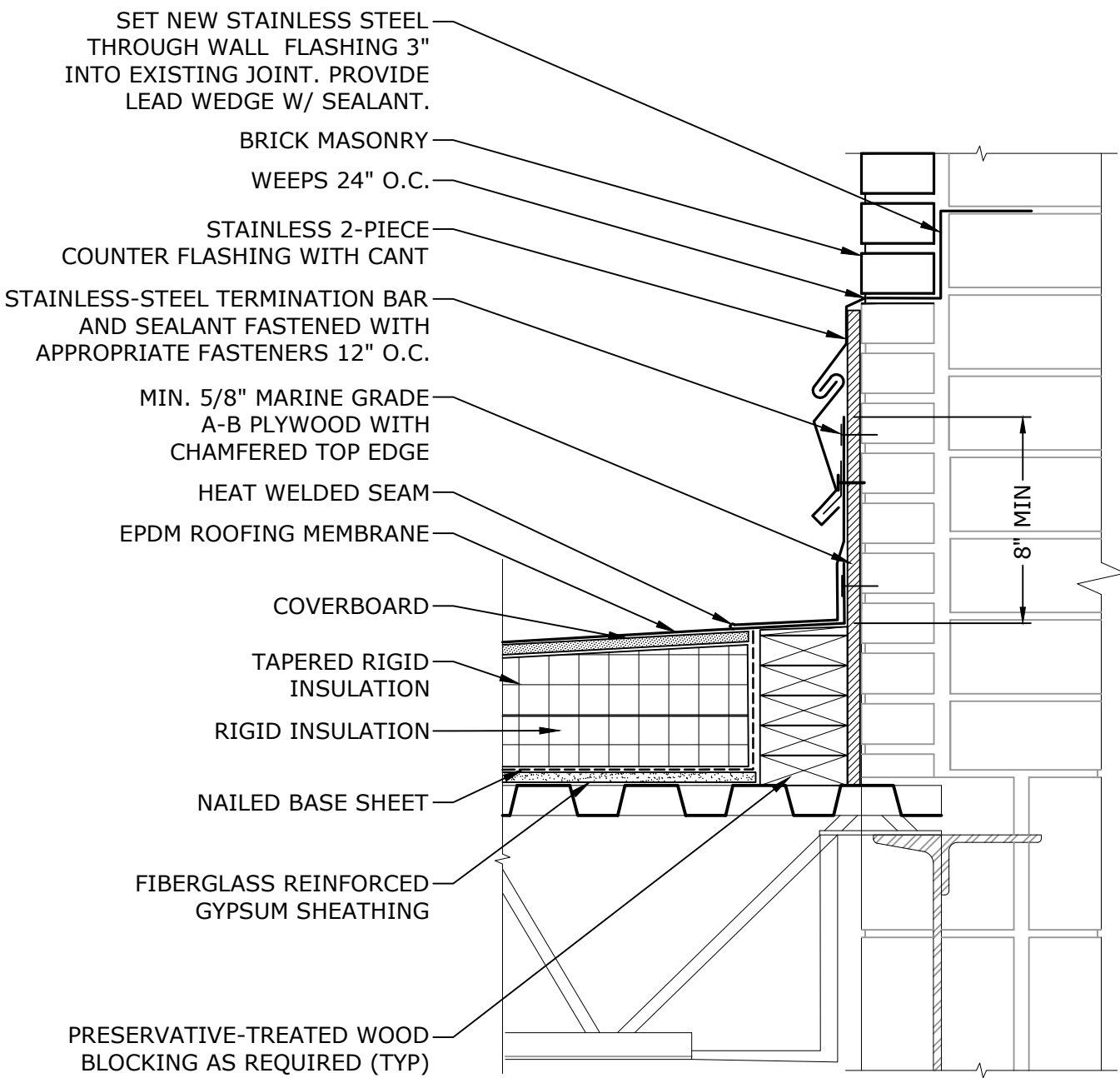
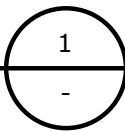
EXISTING



PROPOSED

ROOF EDGE DETAIL

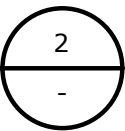
3" = 1'-0"



PROPOSED

ROOF TO WALL DETAIL

1-1/2" = 1'-0"



SCHEMATIC DESIGN
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Hoover
Elementary
School Roof
Replacement
Project

City Of Melrose

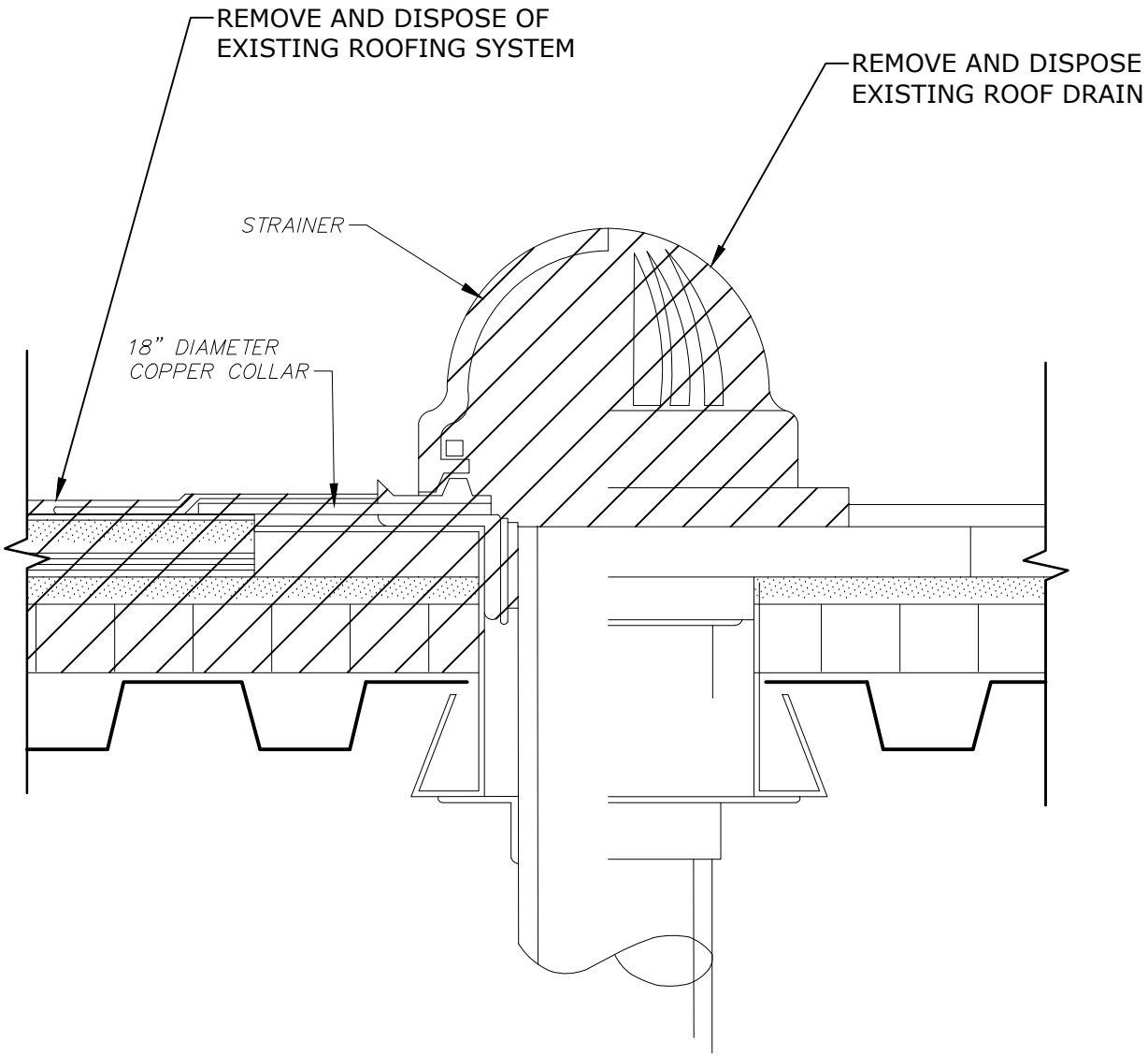
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - A-501.dwg		
DRAWN BY: AH		
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APPROVED: JPV		

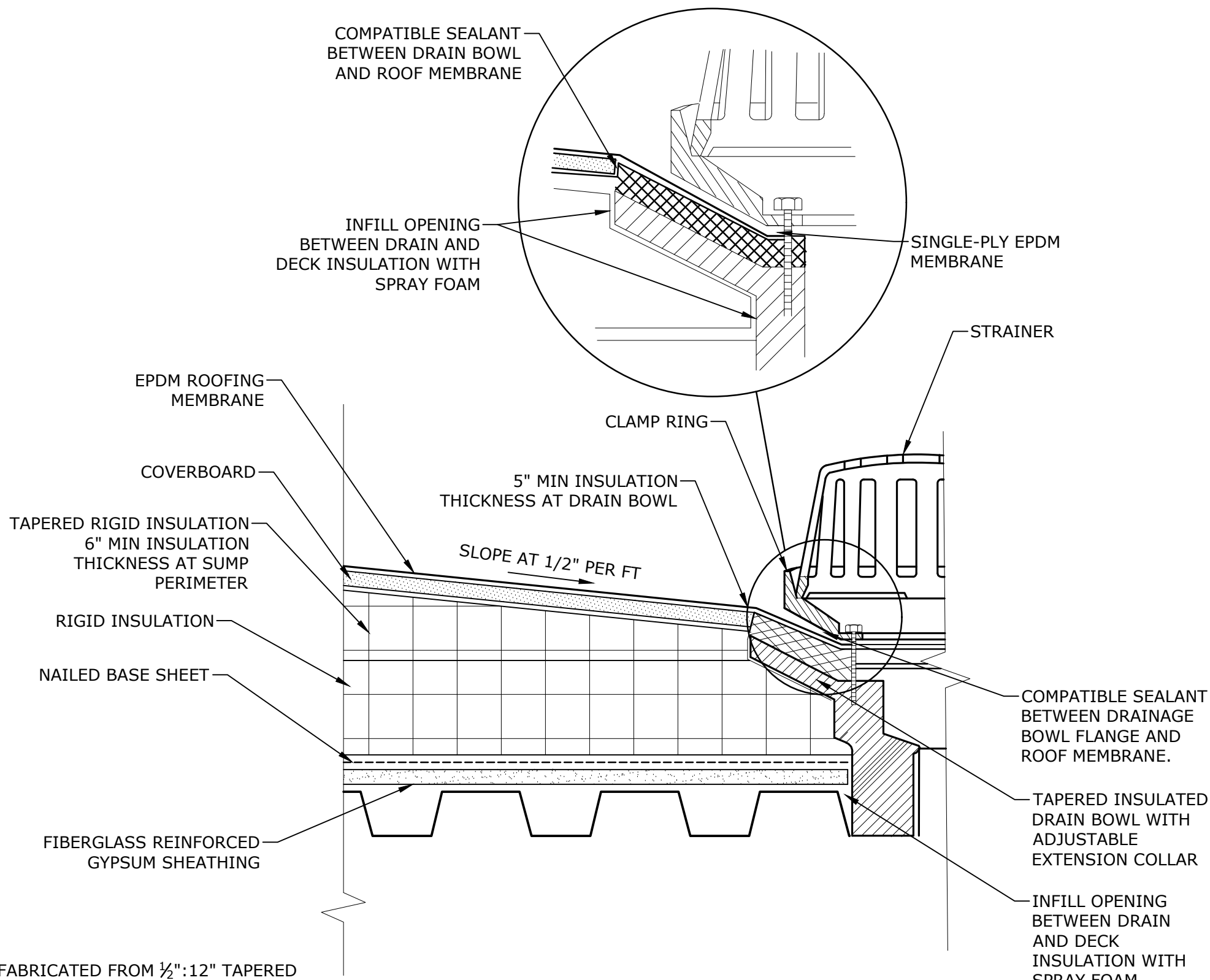
ROOF DETAILS - 2

SCALE: AS SHOWN

A-502



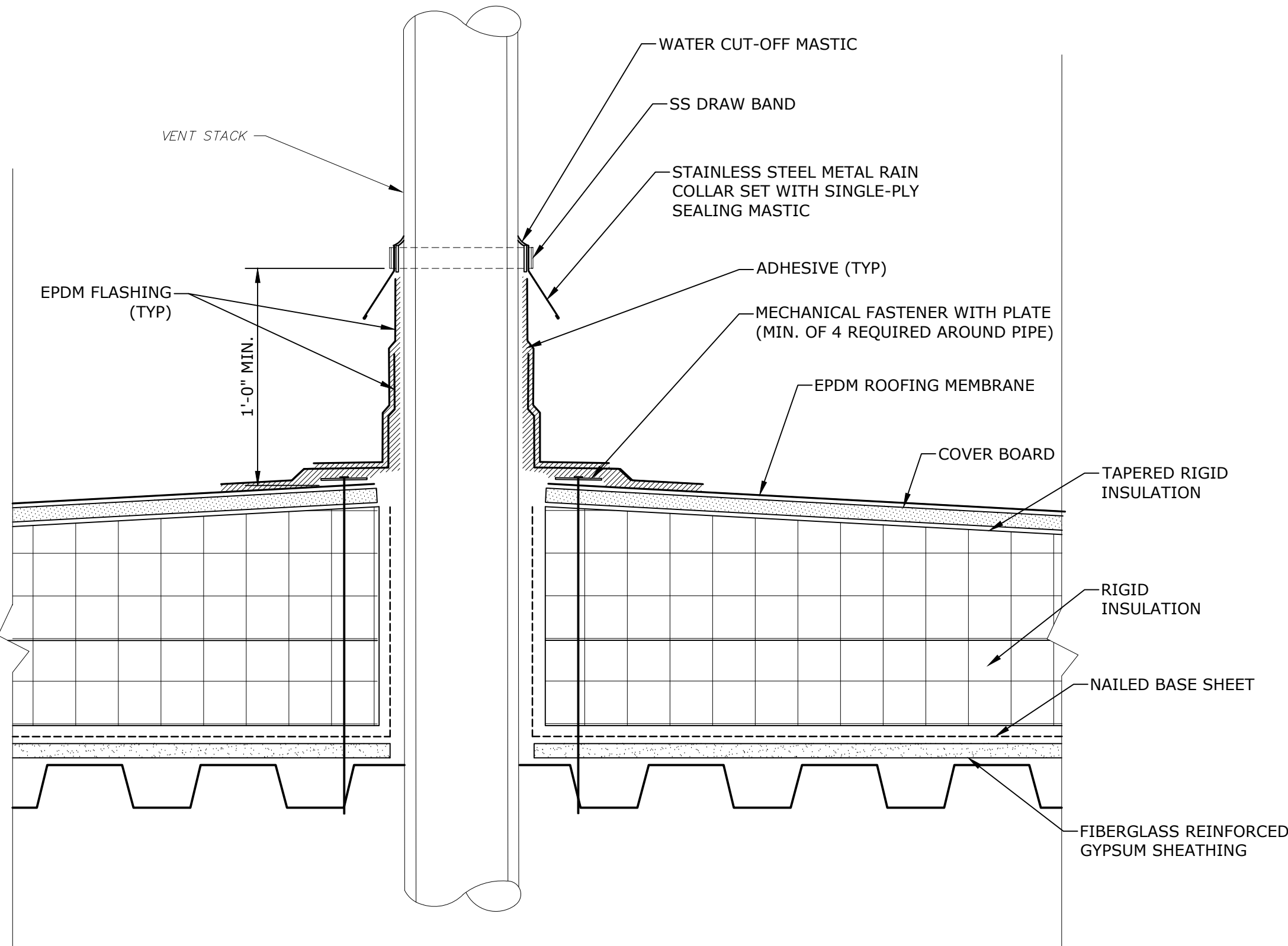
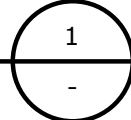
EXISTING



PROPOSED

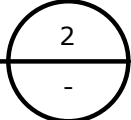
ROOF DRAIN DETAIL

3"=1'-0"



VENT STACK DETAIL

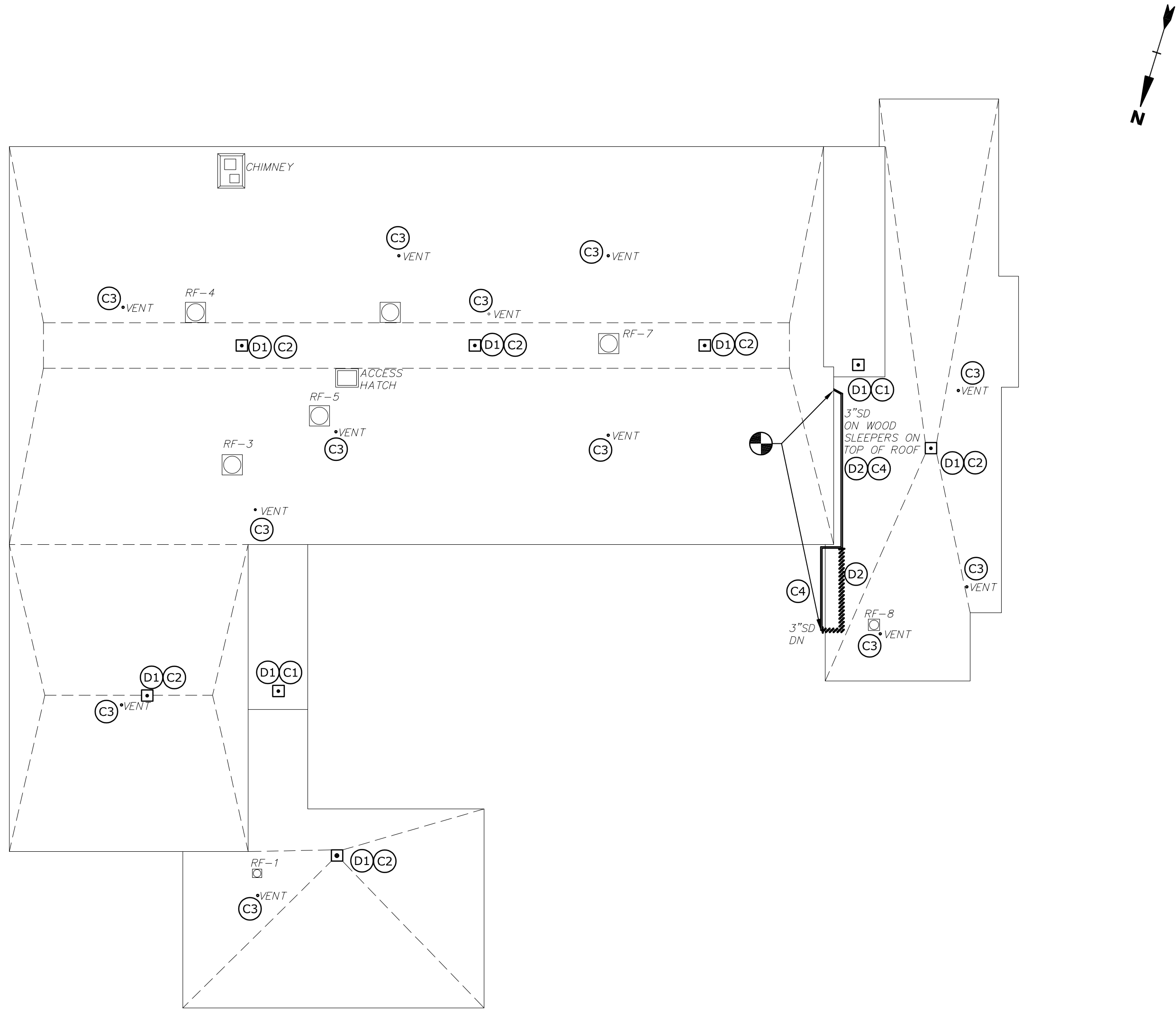
3"=1'-0"



NOTES

1. SUMP MAY BE FIELD-FABRICATED FROM ½":12" TAPERED INSULATION OR PROVIDED AS A PREFABRICATED UNIT.

Last Saved: 6/23/2022
Plotted On: Jun 23, 2022 9:45am By: AHoda
Tighe & Bond: \\VM1215\US\261 Melrose Drawings_Figures\AutoCAD\Viewer Elementary School\Sheet\M1215-026-HOOVER - P-101.dwg



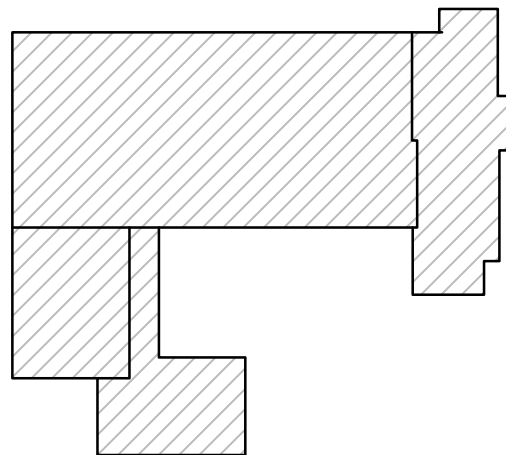
- LEGEND
- ACCESS HATCH
 - ROOF DRAIN
 - VENT PIPE PENETRATION
 - CONNECT TO EXISTING

DEMOLITION KEY NOTES:

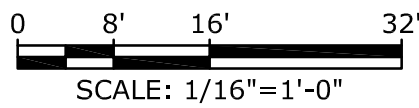
- D1 REMOVE EXISTING ROOF DRAINS. CUT AND CAP EXISTING DRAIN PIPING AWAY FROM DRAIN BODY WITHIN BUILDING. PREPARE FOR FUTURE CONNECTION. COORDINATE EXTENT OF DEMOLITION W/ ROOFING CONTRACTOR TO CONFIRM ADEQUATE CLEARANCE FOR NEW ROOFING INSTALLATION IS PROVIDED.
- D2 DEMOLISH RAIN LEADER AND SLEEPERS BACK TO WALL PENETRATION. DEMOLISH RAIN LEADER TOWARD GROUND AS REQUIRED TO CLEAR ROOF.

CONSTRUCTION KEY NOTES:

- C1 NEW ROOF DRAIN. PROVIDE NEW PIPING FROM DRAIN AND CONNECT TO EXISTING PIPING. INSULATE RD SUMP AND NEW SECTION OF STORM DRAIN PIPING WITH 1-INCH FIBERGLASS INSULATION WITH ASJ. INSULATION THERMAL CONDUCTIVITY TO BE 0.21-0.27 BTU-IN/(h-ft²-°F). ROOF DRAIN OUTLET SIZE AND PIPE SIZE TO MATCH EXISTING. COORDINATE INSTALLATION WITH ROOFING CONTRACTOR.
- C2 NEW ROOF DRAIN. DRAIN TO MATCH OUTLET SIZE OF 4". CONNECT NEW PIPE TO EXISTING STORM DRAINAGE SYSTEM WITHIN THE BUILDING. INSULATE RD SUMP AND NEW SECTION OF STORM DRAIN PIPING WITH 1-INCH FIBERGLASS INSULATION WITH ASJ. INSULATION THERMAL CONDUCTIVITY TO BE 0.21-0.27 BTU-IN/(h-ft²-°F). VERIFY TIE-IN LOCATION IN FIELD. COORDINATE WITH ROOFING CONTRACTOR AND G.C.
- C3 CONFIRM VENT SIZE IN FIELD. EXTEND VENT PIPE WITH SAME SIZE TO TERMINATE 24" ABOVE NEW ROOF.
- C4 PROVIDE NEW CI RAIN LEADER. CONNECT AT WALL PENETRATION, INSTALL WITH 1% PITCH ALONG NEW ROUTING SHOWN, ROUTE ABOVE DOOR TOWARD UNDERGROUND LEADER.



HOOVER KEYPLAN
NO SCALE



Schematic Design
NOT FOR CONSTRUCTION

Hoover
Elementary
School Roof
Replacement
Project

City Of Melrose

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - P-101.dwg		
DRAWN BY: JM		
CHECKED: MPW		
APPROVED: FJH, JPV		
PLUMBING ROOF PLAN		
SCALE:		AS SHOWN
P-101		

Hoover
Elementary
School Roof
Replacement
Project

City Of Melrose

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - H-101.dwg		
DRAWN BY: JM		
CHECKED: MPW		
APPROVED: FJH, JPV		

HVAC ROOF PLAN

SCALE: AS SHOWN

H-101

GENERAL NOTES

1. VERIFY ALL EXISTING CONDITIONS AND DIMENSIONS PRIOR TO COMMENCEMENT OF WORK. COORDINATE ALL WORK WITH OTHER TRADES.
2. THE DRAWINGS ARE DIAGRAMMATIC AND INDICATE THE GENERAL ARRANGEMENT OF SYSTEMS AND WORK INCLUDED IN THE CONTRACT.
3. INSTALL EQUIPMENT AND SUPPORTS IN ACCORDANCE WITH ALL RELEVANT BUILDING CODES.
4. FIELD VERIFY QUANTITY OF MECHANICAL EQUIPMENT, AND SUPPORTS TO BE REMOVED.
5. PERFORM PRE-BALANCE TESTING OF ALL EXHAUST FANS PRIOR TO UNIT REMOVAL, RECORD AIRFLOWS FOR FINAL BALANCING EFFORTS. PROVIDE REPORT TO ENGINEER.
6. PROVIDE TEMPORARY CAPS FOR ALL DUCTWORK. NO DUCTWORK SHALL REMAIN OPEN AT ANY TIME.
7. DURING DEMOLITION, CONTROL WIRING IS TO BE DISCONNECTED AND PROTECTED FOR FUTURE USES/RECONNECTION.
8. PROVIDE NEW HVAC EQUIPMENT PER SCHEDULES. PROVIDE REQUIRED DUCTWORK TRANSITIONS FROM EXISTING DUCTWORK TO NEW FANS AS REQUIRED.
9. ALL MATERIALS, METHODS AND EQUIPMENT INSTALLED MUST BE IN COMPLIANCE WITH PROJECT SPECIFICATIONS AND APPLICABLE CODES.

GENERAL DEMOLITION NOTES

1. IT IS NOT THE INTENT OF THESE DOCUMENTS TO SHOW EVERY DEVICE, APPURTENANCE, PIPE, WIRE, OR CONDUIT TO BE REMOVED. HVAC EQUIPMENT, UNITS, AND SYSTEMS NOT BEING REUSED SHALL BE REMOVED IN THEIR ENTIRETY INCLUDING ASSOCIATED SUPPORTS.
2. PROPERLY DISPOSE OF DEMOLISHED EQUIPMENT IN COMPLIANCE WITH CODES, REGULATIONS, AND DEP STANDARDS. INVENTORY, SALVAGE AND TURN OVER OR DISPOSE OF EQUIPMENT AT DIRECTION OF OWNER.
3. ALL EXISTING SYSTEMS SHALL BE MADE FULLY OPERATIONAL, INCLUDING RECONNECTION TO SERVICES AND DUCTWORK.
4. EXISTING EQUIPMENT TO BE REMOVED AND RE-INSTALLED SHALL BE FIELD VERIFIED FOR QUANTITY AND CONDITION. KEEP AN ACCURATE RECORD OF STORED EQUIPMENT INCLUDING CONDITION.
5. SYSTEMS REQUIRED TO REMAIN IN OPERATION DURING DEMOLITION SHALL BE CAREFULLY PROTECTED FROM DAMAGE AND CONTAMINATION BY THE CONSTRUCTION PROCESS.

DRAWING DEMOLITION NOTES:

- (D1) DISCONNECT, AND DEMOLISH EXHAUST FAN. PROVIDE TEMPORARY CAP OVER DUCT OPENING. MEASURE AIRFLOW OF EXISTING FAN PRIOR TO UNIT REMOVAL.
- (D2) DISCONNECT, REMOVE, AND STORE EXHAUST FAN. PROVIDE TEMPORARY CAP OVER DUCT OPENING. EXISTING CURB TO REMAIN.

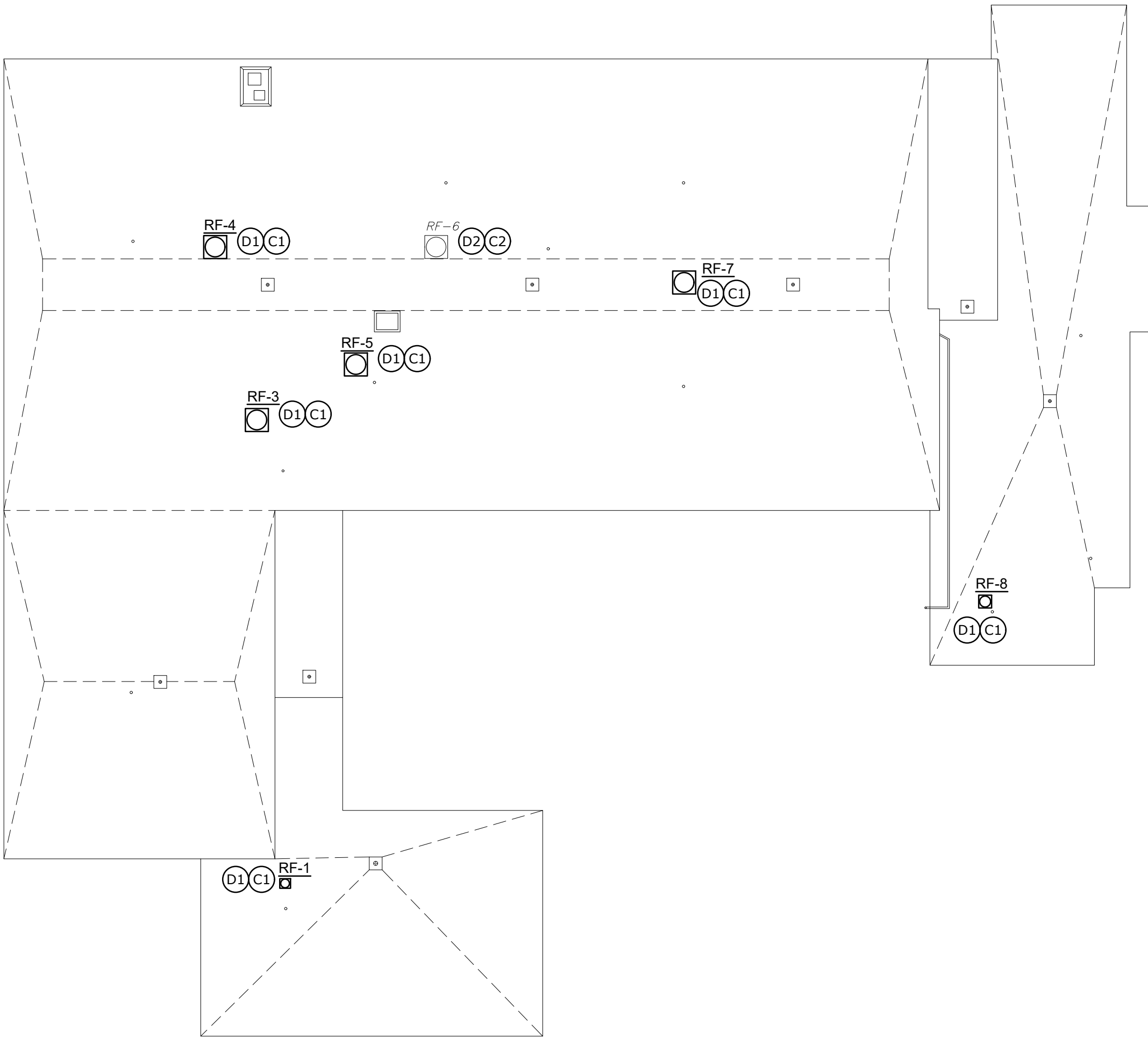
DRAWING CONSTRUCTION NOTES:

- (C1) INSTALL NEW EXHAUST FAN ON CURB, RECONNECT AND SEAL TO EXISTING DUCTWORK. CONNECT FANS TO EXISTING CONTROLS AND BALANCE SYSTEMS TO MATCH SCHEDULED OR EXISTING AIRFLOWS. IF SCHEDULED AND EXISTING AIRFLOWS DIFFER, COORDINATE BALANCING VALUES WITH ENGINEER.
- (C2) RE-INSTALL REMOVED FAN ON CURB, RECONNECT AND SEAL TO EXISTING DUCTWORK. CONNECT FAN TO EXISTING CONTROLS AND BALANCE SYSTEMS TO MATCH SCHEDULED OR EXISTING AIRFLOWS.



LEGEND

- [Hatched Box] ACCESS HATCH
- [Box with X] EXHAUST FAN

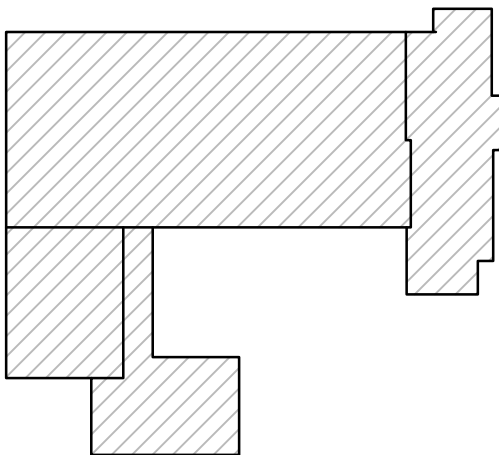


FAN SCHEDULE

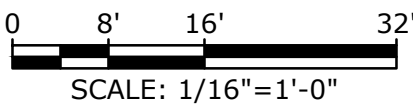
UNIT NO.	LOCATION	SERVING	MANUFACTURER	TYPE	MODEL	CFM	ESP (IN W.C.)	RPM	BHP [W]	MHP	SPEED CONTROL	ELECTRICAL			REMARKS
												VOLTS	PH	FLA	
RF-1	ROOF	KINDERGARTEN	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	101C17DEC	620	¼	1312	[60]	¼	EC	115	1	0.5	[1][2][3][4][5][6]
FAN 2	KITCHEN	KITCHEN		INLINE FAN	B-12	700	¼	1140	-	¼	-	208	1	-	[9]
RF-3	ROOF	2ND FLOOR CLASSROOMS	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	165C17D(VF)	2000	¾	892	0.25	½	EC	115	1	4.1	[1][2][3][4][5][6]
RF-4	ROOF	ALL PURPOSE ROOM	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	210C17D(VF)	2500	¾	597	0.28	½	EC	115	1	4.3	[1][2][3][4][5][6]
RF-5	ROOF	1SR AND 2ND FLOOR TOILETS	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	150C17D(VF)	1500	¾	921	0.17	¼	EC	115	1	3.2	[1][2][3][4][5][6]
RF-6	ROOF	1ST FLOOR CLASSROOMS	USA VENTILATION SYSTEMS LLC	DOWNBLAST CENTRIFUGAL, BELT DRIVEN FAN W BDD AND DS	DB24RH3S	3640	½	610	-	¾	-	208	3	-	[7][8]
RF-7	ROOF	2ND FLOOR CLASSROOMS	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	165C17D(VF)	2000	¾	892	0.25	½	EC	115	1	4.1	[1][2][3][4][5][6]
RF-8	ROOF	TEACHERS	LOREN COOK	DOWNBLAST CENTRIFUGAL, DIRECT DRIVE FAN W BDD, DS AND EC MOTOR	LCRF-100	375	¼	1256	0.05	⅙	EC	115	1	1.9	[1][2][3][4][5][6]

SCHEDULE NOTES:

- [1] DEMOLISH AND REPLACE.
- [2] FURNISH NEW ROOF CURBS (INSTALLED BY GC) WITH NEW FANS. CONFIRM ROOF OPENING, PROVIDE TRANSITION CURBS AS REQUIRED. CURB EDGE MINIMUM 12" ABOVE NEW ROOFING.
- [3] PROVIDE ELECTRONICALLY COMMUTATED MOTORS (ECMS) AND MOTOR MOUNTED SPEED CONTROLS FOR BALANCING.
- [4] PROVIDE FACTORY MOUNTED NEMA 3 DISCONNECT SWITCH.
- [5] PROVIDE HINGED CURB BASE.
- [6] PROVIDE WITH BAROMETRIC BACKDRAFT DAMPERS.
- [7] REMOVE, RETAIN, AND RE-INSTALL.
- [8] REUSE EXISTING CURB AND BLOCKING FOR RETAINED FAN. CURB EDGE MUST BE MINIMUM 12" ABOVE NEW ROOFING, PROVIDE CURB ADAPTER AND/OR CURB EXTENSION AS REQUIRED.
- [9] EXISTING, NOT IN SCOPE.



HOOVER KEYPLAN
NO SCALE



SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Hoover
Elementary
School Roof
Replacement
Project

City Of Melrose

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HOOVER - E-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: FJH, JPV		

ELECTRICAL ROOF PLAN

SCALE: AS SHOWN

E-101

GENERAL NOTES

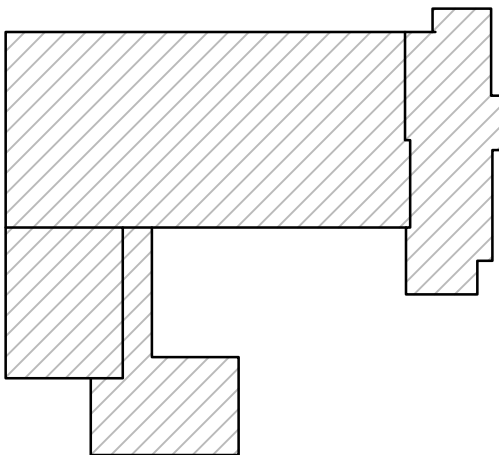
- DISCONNECT AND MAKE SAFE THE EXISTING MECHANICAL EQUIPMENT FOR REMOVAL BY HVAC CONTRACTOR. THE EXISTING FEEDER SHALL BE DE-ENERGIZED AND LOCKED OUT FOR THE DURATION OF THE NEW ROOF WORK. RECONNECT EXISTING FEEDER TO EXISTING AND NEW MECHANICAL EQUIPMENT UPON THE RE-INSTALLATION BY HVAC CONTRACTOR. MODIFY AND EXTEND CONDUIT AND WIRE AS REQUIRED.
- ALL CONDUIT AND CABLE RUNS ACROSS ROOF SHALL BE REMOVED AND REINSTALLED UPON COMPLETION OF ROOF (IF REMOVAL IS NOT ACCEPTABLE SECURE AND MAKE SAFE) UNLESS CONDUITS AND WIRE HAVE BEEN ABANDONED IN WHICH CASE THEY SHALL BE REMOVED PERMANENTLY. ELECTRICAL CONTRACTOR SHALL FIELD VERIFY ALL EXISTING CIRCUITING TO ROOF TOP EQUIPMENT.
- PANELBOARDS SHOWN ARE LOCATED ON FIRST FLOOR.
- PANELBOARD SHOWN ARE LOCATED ON SECOND FLOOR.
- BOLD TEXT AND LINES INDICATE PROPOSED WORK, LIGHT TEXT AND LINES INDICATE APPROXIMATE EXISTING CONDITIONS.
- PROVIDE TEMPORARY POWER AND EQUIPMENT AS REQUIRED TO KEEP SYSTEMS OPERATIONAL, SEE 23 09 93 FOR SEQUENCING AND SCHEDULING.
- THE LOCATIONS OF EXISTING UTILITIES AND EQUIPMENT ARE APPROXIMATE. DETERMINE THE EXACT LOCATION OF EXISTING UTILITIES AND STRUCTURES BEFORE COMMENCING WORK. BE FULLY RESPONSIBLE FOR ANY AND ALL DAMAGE WHICH MIGHT BE OCCASIONED BY FAILURE TO EXACTLY LOCATE AND PRESERVE ANY AND ALL UTILITIES AND STRUCTURES.
- PREVENT DUST FROM BECOMING A NUISANCE OR HAZARD. CONTROL DUST DURING AND AFTER CONSTRUCTION.

GENERAL DEMOLITION NOTES

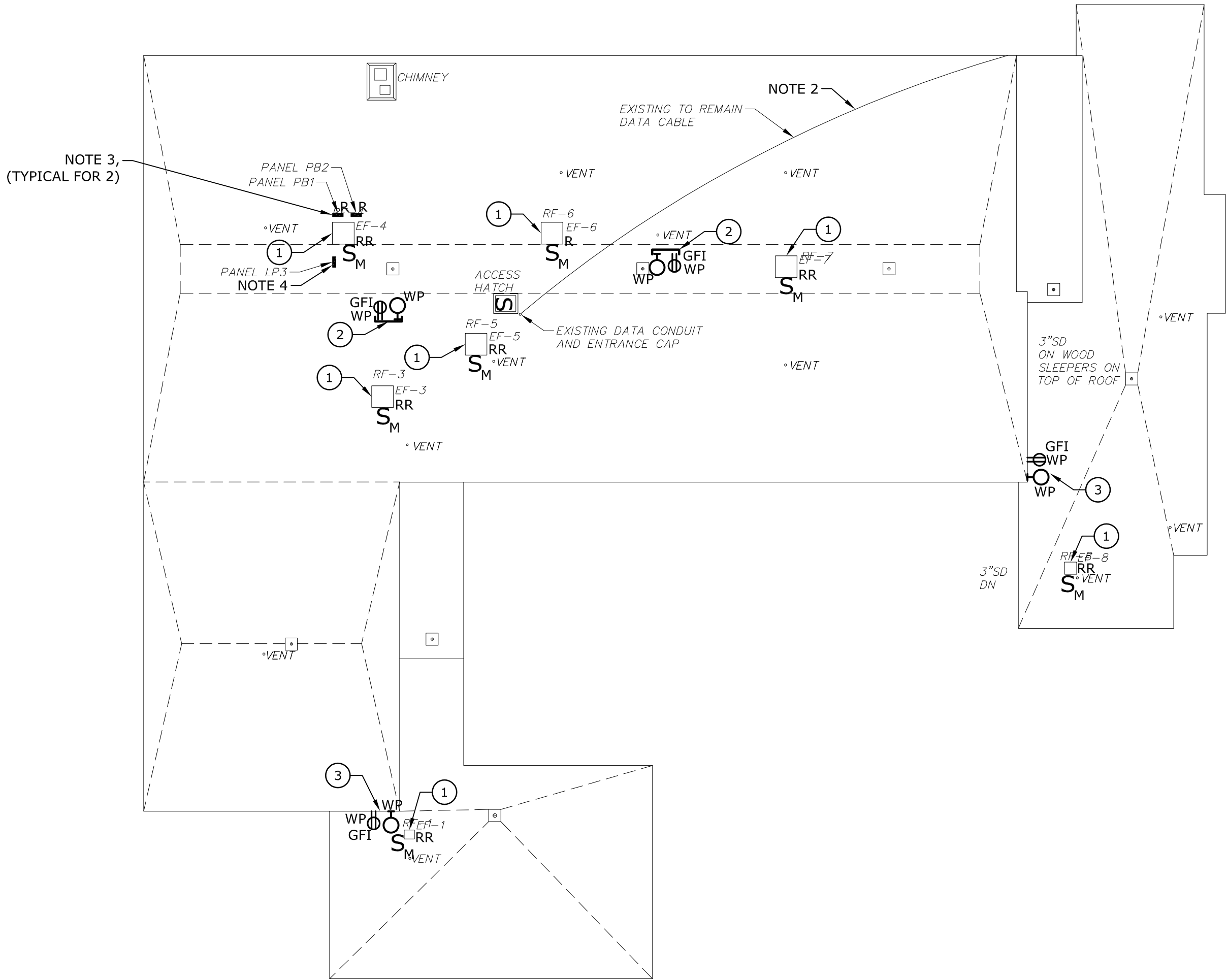
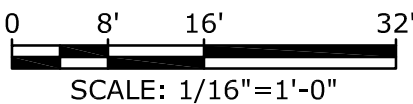
- DEMOLITION SHALL BE THE RESPONSIBILITY OF THE CONTRACTOR. DISCONNECT AND MAKE SAFE BRANCH CIRCUITS, FEEDERS, AS REQUIRED TO ACCOMPLISH THE NEW WORK AS SHOWN OR REASONABLY IMPLIED. THE CONTRACTOR SHALL REFER TO MECHANICAL DRAWINGS OF THIS SET TO DETERMINE THE EXTENT OF THE DEMOLITION WORK REQUIRED.
- BRANCH CIRCUITS SERVING EXISTING DEVICES TO REMAIN AND EXISTING DEVICES TO BE REMOVED SHALL BE MAINTAINED AND RECONNECTED AS REQUIRED AFTER REMOVAL OF THE EXISTING DEVICES, AS NECESSARY TO ACCOMMODATE THE ALTERATIONS.
- COORDINATE WITH THE ENGINEER, GENERAL, AND MECHANICAL CONTRACTORS FOR EXISTING EQUIPMENT TO BE DISCONNECTED AND REINSTALLED.
- THE CONTRACTOR SHALL REMOVE ALL WIRING/CABLING NO LONGER IN USE FROM EXISTING CONDUITS. CONDUITS NO LONGER IN USE SHALL BE CUT BACK AS REQUIRED AND CAPPED.
- REFER TO SPECIFICATIONS FOR ADDITIONAL DEMOLITION CRITERIA.
- CONTRACTOR SHALL ASSUME MATERIALS TO BE DEMOLISHED ARE POSITIVE FOR HAZARDOUS MATERIALS AND DISPOSE OF AS NECESSARY IN ACCORDANCE WITH APPLICABLE REGULATIONS. REFER TO SPECIFICATIONS FOR MORE DETAILS.
- OWNER RETAINS RIGHT OF FIRST REFUSAL FOR ALL ITEMS TO BE REMOVED OR DEMOLISHED. CONTRACTOR SHALL TAKE REASONABLE CARE TO AVOID DAMAGE TO ITEMS TO BE RETAINED BY OWNER. NO ADDITIONAL CHARGE WILL BE ALLOWED FOR REMOVAL OF SALVAGEABLE ITEMS.
- PROPERLY DISPOSE OF DEMOLISHED EQUIPMENT IN COMPLIANCE WITH CODES, REGULATIONS, AND DEEP STANDARDS.

ELECTRICAL KEY NOTES

- DISCONNECT EXISTING EQUIPMENT. SECURE CONDUCTORS AND MAKE SAFE FOR ROOF INSTALLATION. LOCK OUT TAG OUT CIRCUIT AT LOCAL OVERCURRENT PROTECTION DEVICE. RECONNECT TO REINSTALLED OR NEW EQUIPMENT. SEE GENERAL NOTE 1. REFER TO HVAC DRAWINGS FOR DETAILS.
- ROOF TOP WEATHERPROOF GFI RECEPTACLES AND LIGHTS SHALL BE MOUNTED ON ¾" RIGID CONDUIT 18"AFF. LUMINAIRE SHALL BE MOUNTED 6'AFF.
- ROOF TOP WEATHERPROOF GFI RECEPTACLES, SWITCH AND LIGHTS SHALL BE MOUNTED TO EXTERIOR WALL. GFI SHALL BE MOUNTED 18"AFF, LUMINAIRE SHALL BE MOUNTED 6'AFF.



HOOVER KEYPLAN
NO SCALE



ELECTRICAL ROOF PLAN
1/16" = 1'0"

DEMOLITION LEGEND

"RR" EXISTING DEVICE TO BE REMOVED. EXISTING BRANCH CIRCUIT, WIRING AND CONDUIT SHALL BE UTILIZED FOR NEW EQUIPMENT IN EXACT LOCATION. MODIFY AND EXTEND WIRE AND CONDUIT AS REQUIRED. SEE GENERAL DEMO NOTES FOR ADDITIONAL INFORMATION.

"R" EXISTING DEVICE TO REMAIN ACTIVE AS-IS. SEE GENERAL DEMO NOTES FOR ADDITIONAL INFORMATION.

RECEPTACLES

MOUNTED AT 18" AFF UNLESS OTHERWISE NOTED.
NUMBERS/LETTERS SHOWN BESIDE RECEPTACLES SHALL INDICATED THE FOLLOWING:
"GFI" INDICATES INTEGRAL GROUND FAULT INTERRUPTER.
"2" (NUMBER OR PANELBOARD NAME AND NUMBER) INDICATES POWER CIRCUIT NUMBER.

Φ DUPLEX RECEPTACLE.

POWER DISTRIBUTION EQUIPMENT

□ PANELBOARD, SURFACE MOUNTED
S_M LOCKABLE MOTOR RATED TOGGLE SWITCH.
NUMBER OF POLES AS REQUIRED BY LOAD.

**MSBA Accelerated Repair Program
Horace Mann Elementary School
Hoover Elementary School
Roof Replacement project
Melrose, MA**

**Schematic Design Estimate
June 27, 2022**

Tighe & Bond



198 North Washington St, #109, Boston MA 02114



**MSBA Accelerated Repair Program
Roof Replacement project
Melrose, MA
Schematic Design Estimate
BASIS OF ESTIMATE**

6/27/2022

Roof Replacement project

DOCUMENTATION

This estimate was prepared from the following information:

Schematic Design Drawings provided by Tighe & Bond design team, dated June 20, 2022

BASIS FOR PRICING

This estimate reflects the current construction value for the construction of this project and should not be construed as a prediction of a low bid. Prices are based on local prevailing wage construction costs at the time the estimate was prepared.

PROJECT OUTLINE

The project consists of roof replacement at Horace Mann Elementary School and Hoover Elementary School in Melrose, MA.

QUALIFICATIONS

Owner costs and fees are excluded

ITEMS NOT CONSIDERED IN THIS ESTIMATE

Items not included in this estimate are:

Overtime outside industry standard

Work outside normal hours of operation

Preconstruction fees

Utility Company Charges or Hook-up fees have been excluded

No permits or special fees have been included

Third party commissioning costs.

Owner supplied and/or installed items (e.g.. Draperies, furniture and equipment)

Loose Furniture and Equipment

Owner Supplied and Installed Furniture, Fixtures and Equipment

Relocation / move costs

Air Quality monitoring / Vibration monitoring

Loose technology equipment (i.e. Computers, Printers, Etc.)

The estimate assumes all long-lead items can be pre-purchased to meet schedule requirements.

The estimate is based on the premise that the design will meet all codes, laws, ordinances, rules, and regulations in effect at the time that the estimate was prepared. The estimate shall be adjusted should any discrepancies between design

and the aforementioned codes, laws or ordinances result in, or require, an increase in the Cost 'of the Work

Items identified in the design as Not In Contract (NIC)

Builder's Risk insurance, terrorist insurance and other Owner insurances



Roof Replacement project

June 27, 2022

Hoover Elementary School

Melrose, MA

Schematic Design Estimate

		17,714 GSF		
		Cost / SF		
02 Existing Conditions		340,899	19.24	25.5%
04 Masonry		16,200	0.91	1.2%
05 Metals		157,086	8.87	11.7%
06 Wood, Plastics, and Composites		28,464	1.61	2.1%
07 Thermal & Moisture Protection		654,165	36.93	48.9%
22 Plumbing		32,685	1.85	2.4%
23 HVAC		63,526	3.59	4.8%
26 Electrical		44,124	2.49	3.3%
TOTAL DIRECT COST		1,337,148	75.49	100%
Design Contingency	15.00%	200,572	11.32	
General Conditions and General Requirements	11.50%	176,838	9.98	
Permits and fees	excluded	-	-	
Contractor's OH&P	5.00%	76,886	4.34	
Escalation (midpoint 2Q 2023)	5.00%	89,572	5.06	
Construction Contingency	excluded	-	-	
TOTAL ESTIMATED CONSTRUCTION COST		1,881,016	106.19	

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Hoover Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
1	02 Existing Conditions						
2	024100 <i>Selective Demolition</i>						
3	<i>Roof Demolition</i>						
4	Remove and disposed of existing roof - see Hazardous Materials Assessment	17,714	sf		Included		
5	Premium remove original tar & gravel roof system	13,450	sf	4.50	60,525		
6	Roof drain remove	7	ea		with plumbing		
7	Remove and dispose of access hatch	1	ea	450.00	450		
8	Existing insulation thickness test cut	4	ea	150.00	600		
9	Remove and dispose of all exiting exhaust fence curb and flashing	104	lf	18.00	1,872		
10	Remove and dispose of chimney flashing	24	lf	6.50	156		
11	Remove and dispose of vent flashing	10	ea	40.00	400		
12	Cutting and patching	1	ls	3,500.00	3,500		
13	Dispose, cart away	1	ls	4,400.00	4,400		
14	Temporary roof protection	17,714	sf	1.20	21,257		
15	Dust control	1	ls	6,200.00	6,200		
16	Allowance for overhead protection building entrance below.	120	sf	20.00	2,400		
17							
18	026000 <i>Hazardous Materials Assessment</i>						
19	ACM & PCB Abatement of roof	17,714	sf	13.50	239,139		
20							
21	Subtotal: Existing Conditions					\$ 340,899	
22							
23	04 Masonry						
24	041000 <i>Masonry Units</i>						
25	Masonry work associated with installing thru-wall flashing	216	lf	75.00	16,200		
26							
27	Subtotal: Masonry					\$ 16,200	
28							
29	05 Metals						
30	051000 <i>Structural Steel Framing</i>						
31	Structural improvements	1	ls	150,000.00	150,000		
32	053000 <i>Metal Decking</i>						
33	Roof deck replacement at Roof B1 damaged areas, assumed 5% of roof area	886	sf	8.00	7,086		
34							
35	Subtotal: Metals					\$ 157,086	
36							
37	06 Wood, Plastics, and Composites						
38	061600 <i>Rough Carpentry</i>						
39	Install new curbing for all HAVC equipment 12" above new roof	94	lf	48.00	4,512		
40	New 3x Pressure treated blocking at roof edge	998	lf	24.00	23,952		
41							
42	Subtotal: Wood, Plastics, and Composites					\$ 28,464	
43							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Hoover Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
44	07 Thermal & Moisture Protection						
45	075000 Membrane Roofing						
46	New Construction						
47	90 mil EDPM roofing system; 30 year warranty	17,714	sf	30.00	531,420		
48	Tapered crickets	4	ea	80.00	320		
49	New walkway pad, assumed 10% of roof area	1,771	sf	6.50	11,514		
50							
51	076500 Flashing and Sheet Metal						
52	Roof edge metal fascia and securement, continuous extruded aluminum cleat, continuous aluminum hook strip with stainless fasteners	998	lf	49.00	48,902		
53	Snap-on aluminum cover	998	lf	38.00	37,924		
54	New flashing at HAVC equipment curbing	94	lf	14.00	1,316		
55	Stainless steel chimney flashing	20	lf	32.00	640		
56	Access hatch flashing	16	lf	18.00	288		
57	Vents pipe flashing	12	ea	85.00	1,020		
58	Roof drain flashing	8	ea	350.00	2,800		
59	Wall and roof flashing	216	lf	18.00	3,888		
60	Misc. roof flashing	1	al	2,000.00	2,000		
61							
62	077100 Roof Specialties						
63	Access hatch	1	ea	4,250.00	4,250		
64							
65	079100 Joint Sealants						
66	Exterior caulking and sealants at all roof penetrations	17,714	sf	0.45	7,883		
67							
68	Subtotal: Thermal & Moisture Protection					\$ 654,165	
69							
70	22 Plumbing						
71	Demolition						
72	Roof drains	8	ea	332.10	2,657		
73	New						
74	Sanitary vent system						
75	Extend vent piping to 24"	12	ea	570.00	6,840		
76							
77	Roof drainage system						
78	Roof drain including new piping/insulation and tie-in to existing, Allowance	8	ea	1,648.50	13,188		Assume 4" drains
79							
80	Materials supply and bidding/market conditions allowance	1	ls	5,000.00	5,000		
81	Supervision/PM	1	ls	5,000.00	5,000		
82							
83							
84	Subtotal: Plumbing					\$ 32,685	
85							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Hoover Elementary School

	Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
86	23	HVAC						
87		Demolition						
88		Disconnect mechanical piping and ductwork from units and remove and store units for reinstallation, Allowance	15	ea	934.00	14,010		
89		Remove obsolete equipment, Allowance	1	ls	4,000.00	4,000		Quantity/type not indicated
90								
91		New						
92		Re-set units and extend mechanical piping and ductwork	15	ea	1,401.04	21,016		
93								
94		Miscellaneous to include seismic controls and testing/start-up	1	ls	3,500.00	3,500		
95		Materials supply and bidding/market conditions allowance	1	ls	15,000.00	15,000		
96								
97		Supervision/PM	1	ls	6,000.00	6,000		
98								
99		Subtotal: HVAC					\$ 63,526	
100	26	Electrical						
101		Demolition						
102		Antenna, to be reinstalled	3	ea	300.00	900		
103		Conduit/wire, lighting	364	lf	11.64	4,237		
104		Electrical fixture, disconnect only, Allowance	11	ea	200.00	2,200		Fixture' description not provided
105								
106		New						
107		Lighting system						
108		Conduit/wire	364	lf	25.24	9,187		
109								
110		Miscellaneous						
111		Antenna, install previously removed	3	ea	450.00	1,350		
112		Electrical fixture, reconnect, Allowance	11	ea	250.00	2,750		
113								
114		Miscellaneous to include seismic controls and testing/start-up	1	ls	500.00	500		
115		Materials supply, small job premium and bidding/market conditions allowance	1	ls	20,000.00	20,000		
116								
117		Supervision/PM	1	ls	3,000.00	3,000		
118								
119		Subtotal: Electrical					\$ 44,124	
120								

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

HERBERT CLARK HOOVER ELEMENTARY SCHOOL MELROSE, MA PRE-RENOVATION HBMA SERVICES

TO: Denise M. Gaffey – Directory and City Planner – City of Melrose
FROM: Frank Rodrigues – Tighe & Bond
COPY: Matthew Wzorek – Tighe & Bond
DATE: June 8, 2022

Tighe & Bond Inc., (Tighe & Bond) has prepared the following technical memorandum to summarize the Hazardous Building Material Assessment (HBMA) conducted at the Herbert Clark Hoover Elementary School. (the "Site"). A facility improvement project, which includes full replacement of the existing roof is currently proposed for the school building. The current roof systems consists of a rubber membrane roof system over a tar and gravel/built up roof applied onto a metal roof deck. The HBMA was limited to the roof area being proposed for renovation impact and did not include the roof of the modular classroom section of the school. As required by state and federal regulations, characterization of various waste streams generated during construction projects must be completed to ensure their proper management.

The Assessment included a visual observation and bulk sampling of suspect hazardous building materials (asbestos, painted/coated building materials), and a visual inventory of other hazardous/regulated wastes (i.e., mercury-containing equipment, refrigerants, PCB-containing equipment, etc.). The HBMA was performed to support the proposed facility improvement project and to address/prepare budgets for management of environmentally related building materials.

Tighe & Bond's assessment and report are subject to the HBMA Limitations provided as Appendix A. The Assessment was performed on May 20, 2022, by Tighe & Bond's Massachusetts licensed asbestos inspector, Francisco J. Rodrigues, (#AI040131). Mr. Rodrigues' inspector license and certification are included as Appendix B of this report.

1 Hazardous Building Materials Assessment

1.1 Asbestos-Containing Building Materials

Prior to any type of building renovation or demolition, a thorough investigation is required to identify and quantify asbestos containing materials (ACM) which may be impacted by the demolition or renovation activities. The survey is required by the United States Environmental Protection Agency (EPA) National Emissions Standard for Hazardous Air Pollutants (NESHAP) regulations (Title 40 CFR, Part 61, Subpart M); Massachusetts Department of Environmental Protection (MassDEP) regulations (310 CMR 7.15); Massachusetts Department of Labor Standards (MADLS) regulations, (454 CMR 28.00); as well as applicable portions of the Occupational Safety and Health Administration (OSHA) asbestos in construction regulations (CFR 1926.1101).

The asbestos assessment was limited to accessible areas of the roof and roof top equipment to determine the presence or absence of suspect ACM that have potential for disturbance

during the proposed renovation activities and would be subject to abatement prior to roof replacement.

Suspect materials were divided into "homogeneous materials", building materials which were determined by the inspector to be homogeneous based on their color, texture, and age. A number of bulk samples of suspect ACM from each homogenous group of materials were collected in general accordance with standards described in the Environmental Protection Agency (EPA) Asbestos Hazard and Emergency Response Act (AHERA) Regulations for schools. AHERA sampling protocols are only recommended for use by MassDEP and EPA as they do not regulate bulk sampling standards.

Bulk samples were collected and submitted to Aerobiology Laboratories Associates Inc., (Aerobiology) of Woburn, Massachusetts for analysis via Polarized Light Microscopy with Dispersion Staining (PLM/DS) in accordance with the EPA/600/R-93/116 Method. ProScience is a Massachusetts licensed and American Industrial Hygiene Association (AIHA)-accredited asbestos laboratory.

Suspect materials identified and sampled are included as inventory tables in Appendix C. The tables describes material locations, sample numbers, quantities, condition, analytical results, and specific comments relative to our findings. The asbestos laboratory report is included in Appendix D.

The MassDEP defines a material that contains greater than or equal to one percent ($\geq 1\%$) asbestos utilizing PLM/DS, as being an ACM. Materials that are identified as "none detected" are specified as not containing asbestos. Materials containing less than one percent ($< 1\%$) asbestos are regulated to a degree by OSHA related to work practices, worker exposure, and waste containerization and in Massachusetts, materials containing $< 1\%$ asbestos are considered asbestos-containing waste material (ACWM) and must be packaged and disposed of as ACWM in accordance with 310 CMR 7.15.

A total of five homogeneous areas were identified during the inspection and 14 samples of suspect ACM were collected. The tar and gravel/built up roof system located under the rubber membrane roof system was determined to contain $< 1\%$ asbestos and therefore classified as an ACWM.

Samples of other suspect ACM collected during the survey, were determined to be non-asbestos containing. Refer to Appendix C for a list of each suspect material identified and sampled.

Other suspect materials encountered during any renovation activities that are not identified in this report as being non-ACM should be assumed to be ACM until sample collection and laboratory analysis indicate otherwise.

The tar and gravel/built up roof identified at the Hoover School must be managed and disposed of as an ACM.

The ACMs identified at the Hoover School should be removed by a licensed asbestos abatement contractor, utilizing trained and licensed personnel prior to renovation, demolition or any activity that has the potential to disturb these materials. Tighe & Bond recommends the creation of a project specific asbestos abatement scope of work or technical specification for the removal of ACWM. The specification must be developed by a Massachusetts licensed asbestos project designer, and it should address such important issues as regulatory requirements, notification procedures, insurance considerations, air sampling needs and other pertinent information. Abatement activities must be subject to a passing post abatement visual inspection by an asbestos monitoring firm not affiliated with the abatement contractor.

The same firm typically collects, analyzes and reports the State required post abatement clearance air samples.

1.2 Universal Waste and Other Regulated Building Waste

Tighe & Bond performed a visual inspection of the proposed renovation areas to identify hazardous materials, universal waste materials or other regulated wastes that have the potential for disturbance during the roof replacement project. No regulated wastes were identified.

1.3 Lead Based Paint (LBP)

Paint chip sampling was performed to identify lead paint concentrations in those painted components likely subject to impact by renovations. Specifically, one sample was collected from the fascia board which is scheduled to be replaced.

The OSHA 1926.62 Lead in Construction regulations require worker protection and the use of certain work practices if painted building components with detectable levels of lead paint are disturbed during a demolition or renovation. The result of the sampling is intended to provide guidance to contractors for occupational lead exposure controls as it is the responsibility of the contractor to ensure the safety of their employees. Contingent upon renovation or demolition methods, building components coated with lead levels may cause exposures to lead above OSHA standards during proposed renovation or demolition activities.

One suspect lead paint sample was collected from the painted fascia board and was submitted to Aerobiology analysis using the SW846-7420/3051 method. A summary of the test result is presented in Appendix E. The Aerobiology laboratory report is located in Appendix F.

The result of the paint chip sampling performed by Tighe & Bond indicates the paint chip sample collected and analyzed was below the EPA regulatory threshold limit for lead based paint.

Although results were below regulatory thresholds, compliance with OSHA Lead in Construction is required for detectable levels of lead. Lead-containing painted building components should not be subjected to dust-generating activities such as sanding, grinding, sawing, etc. Also, lead-containing painted building materials should not be subject to torch cutting. An LBP determination cannot determine a safe level of lead but is intended to provide guidance for implementing industry standards for lead in paint at identified locations. With this data contractors can better determine potential exposure of workers to airborne lead by understanding the different concentrations of LBP and activities that disturb paint on representative surfaces.

Based on the reportable levels of lead on the painted components tested and subject to waste characterization requirements of the disposal facility, the contractor may be required to conduct Toxicity Characteristic Leaching Procedure (TCLP) testing of the remaining painted waste stream prior to disposal, to determine if the results of that testing exceed the 5.0 mg/L hazardous waste threshold as governed under the Federal EPA "Resource Conservation and Recovery Act" (RCRA - 40 CFR Part 261).

Appendices:

APPENDIX A: HBMA Limitations

APPENDIX B: Inspector's Certification

APPENDIX C: Suspect Asbestos Containing Materials Inventory Table

APPENDIX D: Asbestos Laboratory Report

APPENDIX E: Summary of Lead Paint Materials Table

APPENDIX F: Lead Paint Samples Laboratory Report

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Schematic Design Submission Checklist MSBA Accelerated Repair Program



District: Melrose Public Schools

School: Horace Mann Elementary School

Scope: Roof Replacement

Schematic Design Deliverables:

OPM	District	
☒	☒	Project Narrative: - Existing conditions analysis (hazardous materials, structural, etc.) - Explanation of proposed solution - Designer statement that the proposed solution meets the Massachusetts Stretch Energy Code and/or the International Energy Conservation Code
☒	☒	Code Analysis
☒	☒	Schematic Design Drawings
☒	☒	Cost Estimate (CSI Format) - Include all Proposed Alternates
☒	☒	Form 3011 – Total Project Budget
☒	☒	Project Cash Flow (cumulative line chart illustrating Total Project Budget)
☒	☒	Project Schedule (Gantt Chart)
☒	☒	Accelerated Repair Program Reimbursement Rate Certification signed by the District
☒	☒	Proposed project scope and budget vote language in compliance with MSBA standard vote language

Schematic Design Submission Checklist MSBA Accelerated Repair Program



Program Guidelines and Project Funding Agreement:

OPM	District	
☒	☒	MSBA Board of Directors authorization to execute a Project Funding Agreement is tied to the specific project scope and budget presented in the Schematic Design.
☒	☒	The portion of the Construction Contingency potentially eligible for reimbursement is set at 5% of the total estimated eligible construction costs as included in the PFA's Total Project Budget and is intended for hard costs only. The MSBA will complete one Change Order review per district in which the MSBA will review Change Orders for eligibility not validity. All ineligible costs will not be reimbursed.
☒	☒	The portion of the Owner's Contingency potentially eligible for reimbursement is set at 0.5% of the total estimated eligible construction costs as included in the PFA's Total Project Budget and is intended for soft costs only. All ineligible costs will not be reimbursed.
☒	☒	Prior to securing project funding, the district will draft proposed project scope and budget vote language in compliance with MSBA standard vote language and will provide the vote language to the MSBA for review and approval prior to taking the vote.
☒	☒	After bids have been received and actual construction costs are established, the district's potential Project Funding Agreement must be revised to reflect the actual construction costs in accordance with paragraph 2.3 of the Project Funding Agreement. If there are bid savings, the MSBA shares in the cost savings by reducing the maximum facilities grant to reflect reimbursable costs. If there is a bid overage, construction contingency is transferred to the construction budget to reflect the additional costs and is deemed ineligible. The transfer of construction contingency due to the bid overage results in a reduction to the maximum facilities grant.
☒	☒	MSBA's standardized Schedule of Values will be used by the district to ensure that all budget entries in the MSBA's ProPay system mirror the Total Project Budget Form 3011 following the PFA Bid Amendment. The MSBA will only reimburse eligible costs if they are entered to the correct cost codes in the Total Project Budget.
☒	☒	Budget Revision Requests will be submitted by the district in a timely manner to reflect changes to the Total Project Budget. After a Budget Revision Request is executed, the district will enter the Budget Revision Request into the ProPay system for approval by the MSBA.

Schematic Design Submission Checklist MSBA Accelerated Repair Program



☒	☒	MSBA's Audit Department will review requests for reimbursement in the ProPay system of \$50,000 or more. All reimbursement requests which are less than \$50,000 will be returned to the district without review. All districts are encouraged to attend ProPay training conducted by the Audit Department following the execution of a Project Funding Agreement.
☒	☒	OPM monthly reporting begins when the OPM contract is executed and continues until the project receives Board of Directors approval of the final audit. Failure to submit timely and complete reports may impact district reimbursement review and payment. OPM monthly reporting supports MSBA review of reimbursement requests.

I certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that I have fulfilled all requirements described in Section 8.2 of the MSBA Standard Contract for Project Management Services (Accelerated Repair Program) by submitting the listed deliverables by the established deadline to the MSBA. I further certify, as evidenced by the boxes set forth under the heading, "Program Guidelines and Project Funding Agreement," which I have checked above, that I have explained the Program Guidelines and Project Funding Agreement to the district.

I understand that if a conflict is created between this form and the Project Funding Agreement, the Project Funding Agreement is the controlling document. I also understand that if a conflict is created between this form and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program), the MSBA Standard Contract is the controlling document. I further recognize that the purpose of this form is to further understand the Project Funding Agreement and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program).

Title: Project Director, Owner's Project Manager
Firm: The Vertex Companies, LLC
Date: June 27, 2022

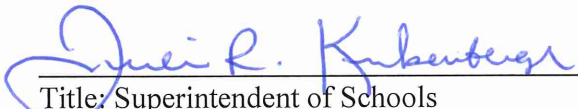
I certify, as evidenced by the boxes set forth under the heading, "Program Guidelines and Project Funding Agreement," which I have checked above, that I have read and understand the Program Guidelines and Project Funding Agreement. I certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that I have reviewed the enumerated deliverables within the Schematic Design Submittal with the Owner's Project Manager and Designer. I further

Schematic Design Submission Checklist MSBA Accelerated Repair Program



certify, as evidenced by the boxes set forth under the heading, "Schematic Design Deliverables," which I have checked above, that the OPM has explained to me the OPM's responsibilities as described in Section 8.2 of the MSBA Standard Contract for Project Management Services (Accelerated Repair Program) to submit the designer's deliverables listed above.

I understand that if a conflict is created between this form and the Project Funding Agreement, the Project Funding Agreement is the controlling document. I also understand that if a conflict is created between this form and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program), the MSBA Standard Contract is the controlling document. I further recognize that the purpose of this form is to further understand the Project Funding Agreement and the MSBA Standard Contract for Project Management Services (Accelerated Repair Program).



Title: Superintendent of Schools
Date: June 27, 2022

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Tighe&Bond

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Appendices

A	Code Analysis
B	Schematic Design Drawings `
C	Cost Estimate
D	Form 3011 – Total Project Budget
E	Project Cash Flow
F	Project Schedule
G	ARP Reimbursement Rate Certification and Checklist
H	Proposed Project Scope and Budget Vote Language
I	Hazardous Materials Assessment Report
J	Roof Sampling Test Cut Report

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

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Section 1

Project Narrative

1.1 Introduction

The City of Melrose is currently participating in the Massachusetts School Building Authority (MSBA) Accelerated Repair Program (ARP) and has submitted a Statement of Interest for repairs at the Horace Mann Elementary School. The Vertex Companies, LLC. and Tighe & Bond Designer Services, Inc. were subsequently designated as the Owner's Project Manager (OPM) and Designer, respectively for the proposed project.

The Horace Mann Elementary School is located at 40 Damon Avenue in Melrose, MA. The school building is a two-story brick masonry building with an approximate roof area of 14,000 square feet, which was constructed in 1949 with an addition constructed in 1955. The school has undergone several renovations over time, including accessibility and interior improvements in 2017. The first floor of the school generally consists of classrooms, a library, administrative and nurse offices, storage rooms, a multipurpose room, and bathrooms. The second floor contains classrooms and bathrooms. The school currently serves approximately 270 students from kindergarten to fifth grade.

The team assembled for execution of the Herbert Clark Hoover School project includes the following members:

- | | |
|----------------------------------|---|
| • Funding Agency | Massachusetts School Building Authority |
| • Owner | Melrose Public Schools |
| • OPM | The Vertex Companies, LLC |
| • Designer | Tighe & Bond, Inc. |
| • Cost Estimating | Ellana Construction Consultants. |
| • Hazardous Materials Assessment | Tighe & Bond, Inc. |
| • Code Review | Tighe & Bond, Inc. |
| • Structural/Construction Admin | Frawley Engineering, P.C. |

1.2 Existing Conditions

1.2.1 Roof

The existing thermoplastic polyolefin (TPO) membrane roof system does not appear to be original to the original building constructed in 1949. The addition constructed in 1955 also consists of a TPO membrane roof system. Based on documents provided by the District, the original roof on the portion of the building constructed in 1949 consisted of 5 ply coal tar pitch and gravel over 2.5" insulation on a steel roof deck. The original roof on the portion of the building constructed in 1955 consisted of a bonded membrane roof over 2.5" insulation on a steel deck. Based on recent site visits and field investigation, the entire roof area currently consists of a fully-adhered TPO membrane roofing system, with 3" rigid insulation and tar paper underlayment.

There is significant evidence of water damage inside the building from roof leaks and numerous deficiencies in the roofing membrane. The roof does not provide adequate thermal performance and drainage. Based on the site observations and investigation, the existing roofing system and majority of associated appurtenances appear to be in poor condition and are beyond their useful life.



**Photo 1: Existing Roof over
1949 Building**



**Photo 2: Existing Roof over
1955 Addition**

1.2.2 Plumbing

There are existing roof drains that are tied into the storm drainage system in the building. The drains appear to be in working order, however some are rusted and in poor condition.

Plumbing vents penetrate the roof in multiple locations to provide pressure relief for the school's sanitary piping system. The vent piping is in good condition with expected rust on the pipe interior.



Photo 3: Existing Roof Drains

1.2.3 HVAC

There are four exhaust fans (EFs) installed on the existing roof. Most of the existing fans' nametags are unreadable, therefore the age of the fans can't be determined. The fans appear to be in good condition and should be retained.



**Photo 4: Exhaust Fan
on 1949 Roof**



**Photo 5: Equipment and Chimney
on 1955 Building Addition**

1.2.4 Electrical

The existing electrical items on the roof are limited to electrical connections to any HVAC equipment requiring electrical power. It is assumed that each HVAC fan has an integral or equipment-mounted disconnect.

1.3 Recommended Solutions

1.3.1 Roof Replacement

Replacement of the existing roof system at the Horace Mann School is recommended for improving thermal performance, roof drainage, overall energy efficiency of the building, and remedying numerous roof leaks. The following items below outline the proposed scope of work for the project, including demolition. Schematic Design plans with additional detail are included in Appendix B.

Roof Demolition will include:

- Removal of the existing TPO membrane roofing system
- Removal of the existing rigid insulation and fiberboard
- Removal of the existing access hatch
- Repair of the steel roof deck as needed
- Removal and storage of existing HVAC equipment
- Removal of existing fascia, damaged curbing, blocking, and flashing

Proposed Roof Improvements will include:

- Repair of any damaged or compromised steel roof decking discovered during demolition
- Installation of a fully-adhered EPDM roofing system. The new roofing system will include, from bottom to top:
 - Fiberglass-reinforced gypsum sheathing cover board
 - Base sheet/ combination air and vapor barrier
 - New polyisocyanurate rigid insulation. The new insulation will meet MSBA Accelerated Repair Program Requirements, including the stretch energy code. Insulation thickness will provide a minimum R-value of 30. Tapered insulation will be installed to provide a positive pitch toward roof drains.
 - ½" coverboard installed over the insulation
 - Fully-adhered EPDM roofing membrane
- Installation of new curbing, flashing, blocking, metal fascia, and roof drains
- Installation of new access hatches, ladders, and protective guardrails

1.3.2 Plumbing Systems

Plumbing Demolition will include:

- Removal of all existing roof drains. Existing rain leaders within building will be cut and capped away from the drain body and prepared for reconnection.

Proposed Plumbing Improvements will include:

- Installation of new roof drains and associated piping. All new roof drains will be replaced in kind.
- Installation of 1" thick insulation on drain bodies and new drainage piping.
- Inspection of existing drainage piping, including snaking the pipes to check for clogs and jetting the pipes should there be any clogs present.

- Extension of vent piping as required to maintain clearance above roof of 18-24".

1.3.3 HVAC Systems

HVAC Demolition will include:

- Disconnection, removal, and storage of all exhaust fans
- Removal and disposal of roof curbs on original building's roof.
- Prior to unit removal, exhaust fans will be tested and airflows recorded for final balancing efforts.
- Installation of temporary caps for all ductwork.
- Installation of temporary caps over curbs on newer building's roof.

HVAC Improvements will include:

- Installing new curbs for exhaust fans on older roof; including new transition curbs as required for fan connection to the existing roof opening.
- Repairing curbs and/or blocking with minor damage and extending existing curbs as required. Provision of adapter curbs as required for fan re-installation
- Reinstallation of retained exhaust fans
- Reconnecting and sealing units to existing ductwork.
- Reconnecting units to existing controls.
- Re-testing and balancing systems to match pre-existing airflows.

1.3.4 Electrical Systems

The proposed electrical work will include:

- Disconnecting and making safe all existing electrical devices with connections to mechanical equipment. Once the existing equipment is placed back in its permanent location after roofing, the electrical connections will be re-energized. For any equipment that has moved, the existing conduit and wires will be extended as required.

1.4 ARP Sustainability Requirements

MSBA's ARP requires use of the Stretch Energy Code (780 CMR – Appendix AA and 2015 IECC) as the basis of design for ARP projects for roof replacement. Below is a table comparison of the required code values for the relevant project items and the values for the proposed assemblies. The proposed solutions and items for the Herbert Clark Hoover School meet or exceed the ARP sustainability requirements.

Roofs	Maximum U-Value (Btu/hr·ft ² ·°F)	Minimum R-Value (°F·ft ² ·hr/Btu)
Required	0.032	30
Proposed	0.032	30

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Horace Mann School Repairs Project

Building Code Analysis

This analysis summarizes codes requirements applicable to the project scope for the Horace Mann School Repairs Project. This summary includes general code information applicable to the overall project and more specific requirements related to roof replacement activities.

Applicable codes for this project include:

- International Building Code 2015 (IBC)
- International Existing Building Code 2015 (IEBC)
- International Energy Conservation Code 2018 (IECC)
- 248 CMR 10.00 Uniform State Plumbing Code (2017)
- Commonwealth of Massachusetts State Building Code, Ninth edition 780 CMR (including amendments to the IBC, IECC and IEBC)
- Massachusetts Stretch Energy Code 780 Appendix AA
- Architectural Access Board Regulations 521 CMR (AAB)
- American Society of Civil Engineers – Minimum Design Loads for Buildings and Other Structures (ASCE 7-05)
- National Electrical Code NFPA 70

Section 1 – General Code

Use and Occupancy Classification (305 IBC 2015 & 780 CMR)

- Educational (E)
 - Due to the anticipated scope of work, roof replacement, Level 1 alterations of the IEBC will be triggered. Level 1 alterations encompass the removal and replacement of materials that serve the same purpose. Any new elements must comply with the requirements for new construction.

Types of Construction (602 IBC 2015 & 780 CMR)

- Type III Construction – Construction is that type of construction in which the exterior walls are of noncombustible materials and the interior building elements are of any material permitted by this code. Fire-retardant-treated wood framing complying with Section 2303.2 shall be permitted within exterior wall assemblies of a 2-hour rating or less.

Alterations Level 1 (503 IEBC 2015 & 780 CMR)

- Removal and replacement or the covering of existing materials, elements, or fixtures using new materials, elements, equipment, or fixtures that serve the same purpose.

Material and Methods (702.6 & Chapter 8 IEBC 2015 & 780 CMR)

- All new work shall comply with materials and methods requirements in the IBC, IEBC, IECC, IMC, and MSPC, as applicable that specify material standards, details of installation and connection, joints, penetrations, and continuity of any element, component, or system in the building.

Section 2 – Requirements Applicable to Roof Replacement Work**Building Envelope Requirements (IECC 2015, Table C402.3)**

- Roof Maximum U-Factors
 - Insulation entirely above deck – U-0.032
- Roof Minimum R-Values
 - Insulation entirely above deck – R-30ci

Massachusetts State Building Code (780 CMR Amendments)

- Dead loads on an existing roof may not increase by more than 5% due to a re-roofing project.
- If the additional dead loads exceed 5%, the structure must conform to current snow load requirements.
- Since a similar EPDM roofing system (and ballast in some locations) is being removed from the roof prior to roof replacement, the new built-up roof is not anticipated to increase the dead load on the roof by more than 5%.

Code of Federal Regulations Title 29 (29 CFR)

- Holes – each employee on walking/working surfaces shall be protected from falling through holes more than 6 feet above lower levels, by personal fall-arrest systems, covers, or guardrail systems erected around such holes.

Uniform State Plumbing Code 248 CMR 10.00

- Storm Drain leaders are sized based on roof area served. The original roof area and the addition roof area are 9900sqft and 3600sqft respectively and include three (3) 4" roof drains each. A 4" roof drain can capture storm water from 4600sqft of roof area per 248 CMR 10.0. The roof drain sizes installed suffice for the school's roof. The new roof drains will use the same outlet size as the existing ones.

Section 4 – Accessibility Requirements**Existing Building (3.3 MAAB 521 CMR)**

- Requirements for an accessible entry, toilet, drinking fountain, and telephone (if pay phones are provided) will be triggered based on the estimated cost of the project. A proponent is required to provide these items if the cost of a renovation project exceeds \$500,000.

Building Code Analysis**Tighe&Bond**

- If the work costs less than \$100,000, then only the work being performed is required to comply with 521 CMR.
- Exception: Whether performed alone or in combination with each other, the following types of alterations are not subject to 521 CMR 3.3.1, unless the cost of work exceeds \$500,000 or unless work is being performed on the entrance or toilet room.
 - Curb cuts
 - Alteration work which is limited solely to electrical mechanical, or plumbing systems; to abatement of hazardous materials; or retrofit of automatic sprinklers and does not involve the alteration of any elements or spaces required to be accessible under 521 CMR. Where electrical outlets and controls are altered, they must comply with 521 CMR
 - Roof repair or replacement, window repair or replacement, repointing and masonry repair work
 - Work related to septic system repairs, site utilities and landscaping.
- If the cost of the project, and any additional renovations completed within 36 months of the project, exceeds 30% +of the full and fair cash value of the building, the entire building must be upgraded as required to meet 521 CMR requirements.
- The building currently complies with ADA/AAB requirements and accessibility upgrades will not be required as part of this project.

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Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

HORACE MANN ELEMENTARY SCHOOL

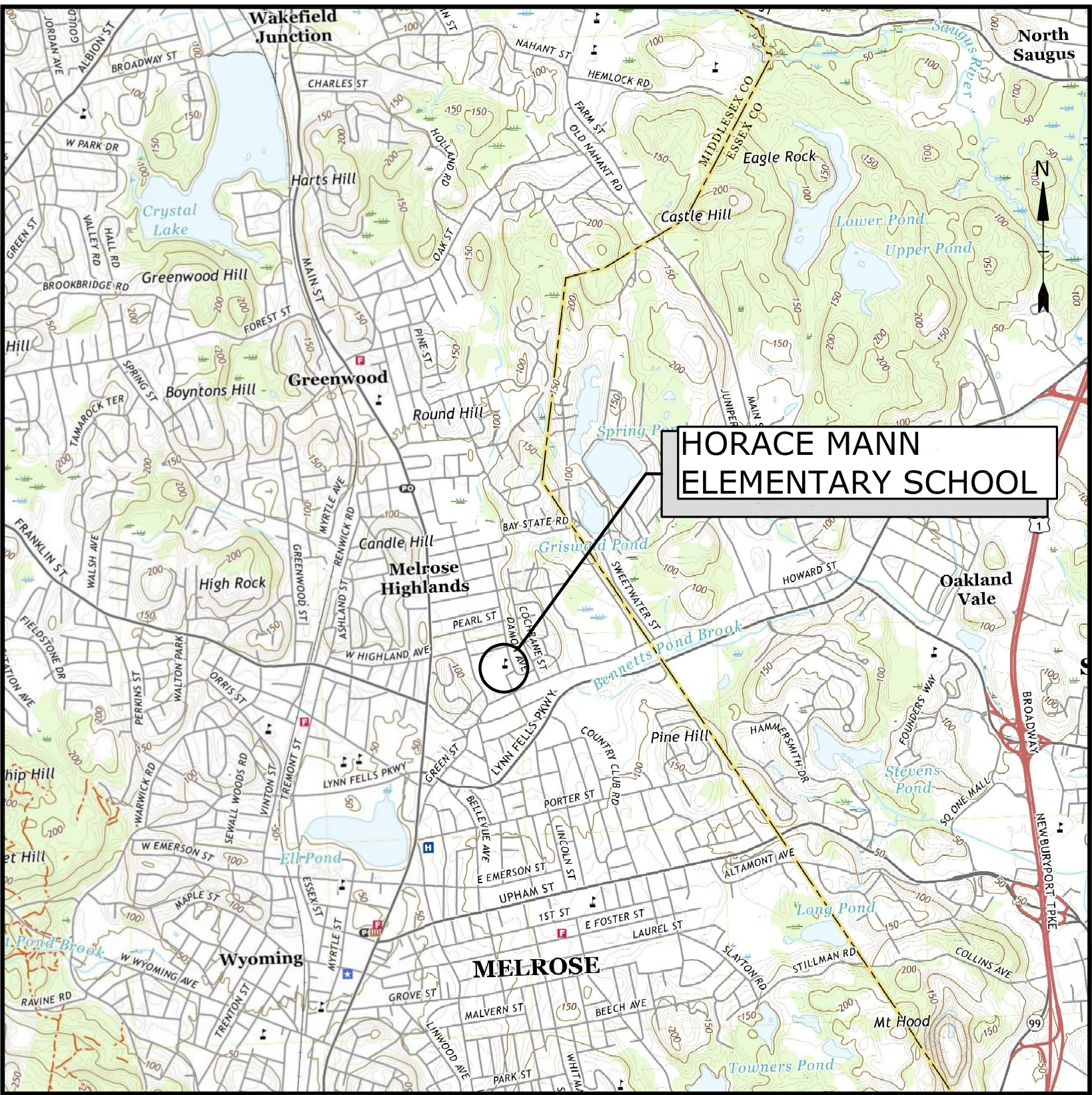
MSBA ACCELERATED REPAIR PROGRAM

ROOF REPLACEMENT PROJECT

MELROSE, MASSACHUSETTS

JUNE 2022

LIST OF DRAWINGS	
	COVER
G-001	ROOF PHOTOGRAPHS
AD-101	ROOF DEMOLITION PLAN
A-101	ROOF REPLACEMENT PLAN
A-501	ROOF DETAILS - 1
A-502	ROOF DETAILS - 2
P-101	PLUMBING ROOF PLAN
H-101	HVAC ROOF PLAN
E-101	ELECTRICAL ROOF PLAN



LOCATION MAP
SCALE: 1" = 2000'

PROJECT TEAM:

OWNER
CITY OF MELROSE
562 MAIN STREET
MELROSE, MA 02176

OWNER'S PROJECT MANAGER
THE VERTEX COMPANIES, INC.
400 LIBBEY PARKWAY
WEYMOUTH, MA 02189

COST ESTIMATING
ELLANA, INC.
98 NORTH WASHINGTON STREET
SUITE 109
BOSTON, MA 02114

FUNDING
MASSACHUSETTS SCHOOL
BUILDING AUTHORITY
40 BROAD STREET, SUITE 500
BOSTON, MA 02109

ENGINEER
TIGHE & BOND
DESIGNER SERVICES, INC.
53 SOUTHAMPTON ROAD
WESTFIELD, MA 01085

PREPARED BY:
Tighe&Bond

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION
COMPLETE SET 9 SHEETS

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

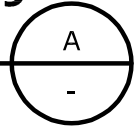
City Of Melrose

Melrose,
Massachusetts

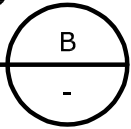
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CHECKED: MPW		
APPROVED: FJH, JPV		
ROOF PHOTOGRAPHS		
SCALE:		AS SHOWN
G-001		



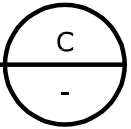
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BUILDING
NO SCALE



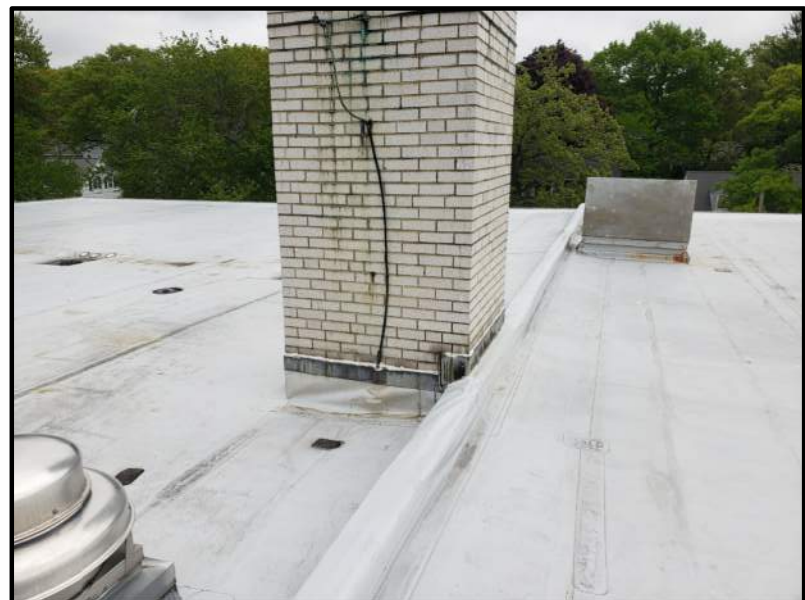
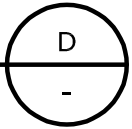
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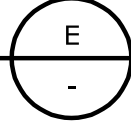
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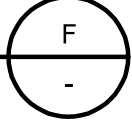
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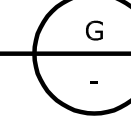
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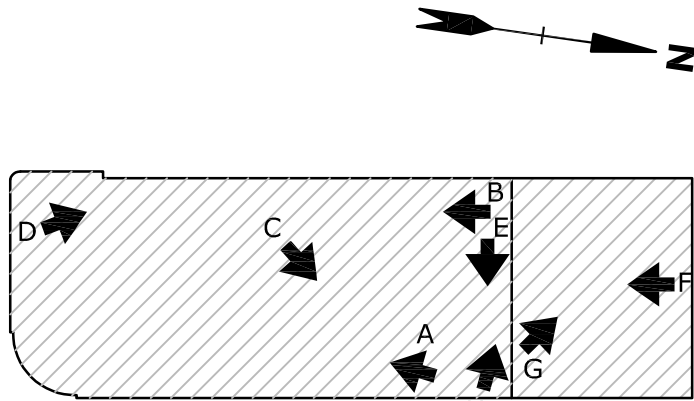
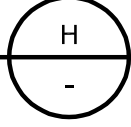
CHIMNEY AND EQUIPMENT ON
1955 ADDITION
NO SCALE



ROOF DRAINS ON 1955
ADDITION
NO SCALE



EXISTING CHIMNEY
NO SCALE



HORACE MANN KEYPLAN
NO SCALE

LEGEND:

← A PHOTOGRAPH LOCATION

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

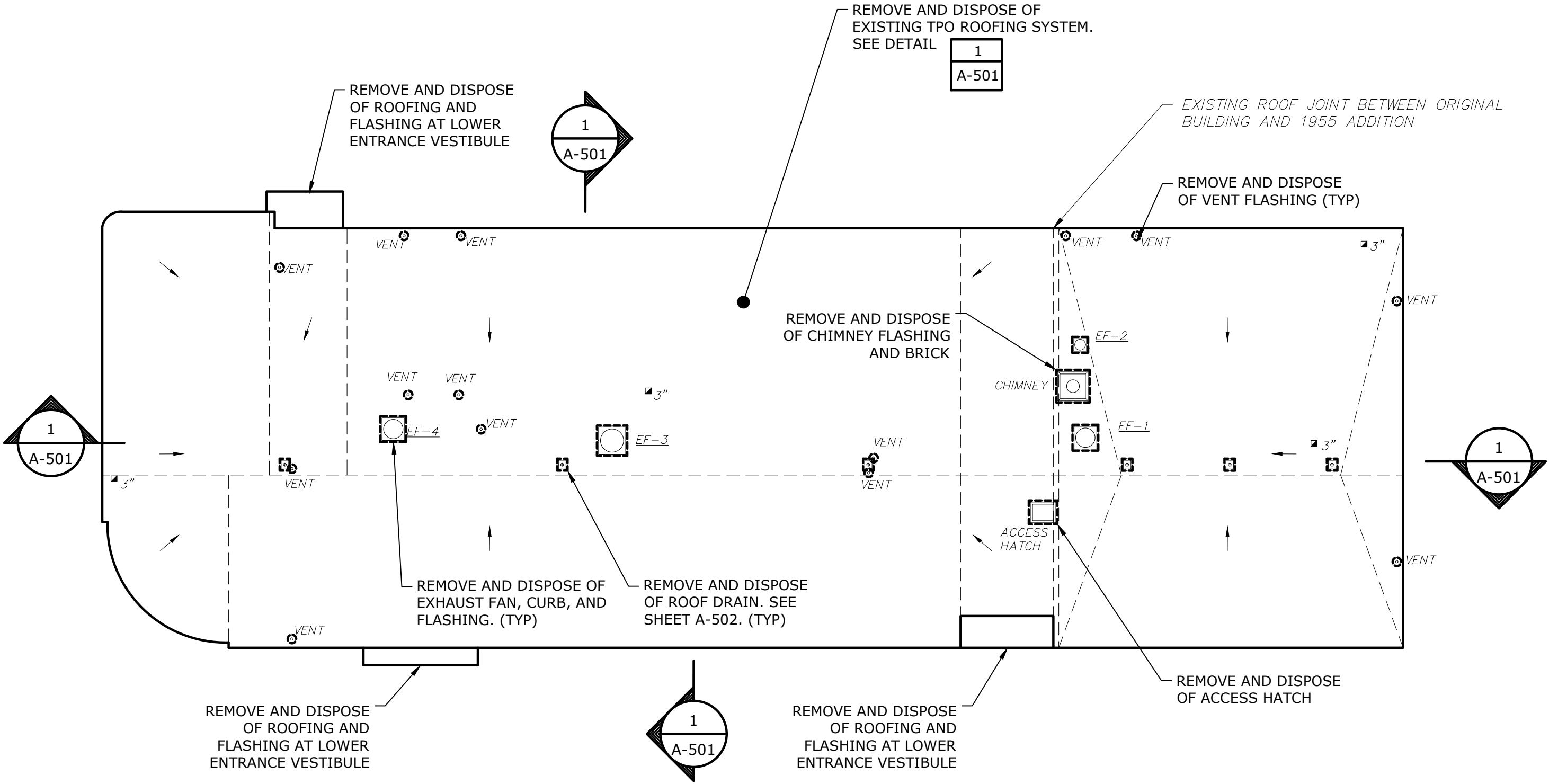
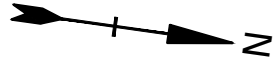
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DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		

ROOF DEMOLITION PLAN

SCALE: 1/8"=1'-0"

AD-101



LEGEND

- ROOF DRAIN

EXISTING VENT PIPE PENETRATION

EXISTING ROOFTOP EXHAUST FAN/DUCT WITH CURB

EXISTING ROOFTOP EQUIPMENT ON SLEEPERS

GAS PIPE ON PIPE SUPPORT
- EXISTING GOOSENECK (INTAKE OR EXHAUST)

EXISTING EXHAUST CAP OR AIR INTAKE

EXISTING CAPPED CURB

EXISTING INSULATION THICKNESS TEST CUT

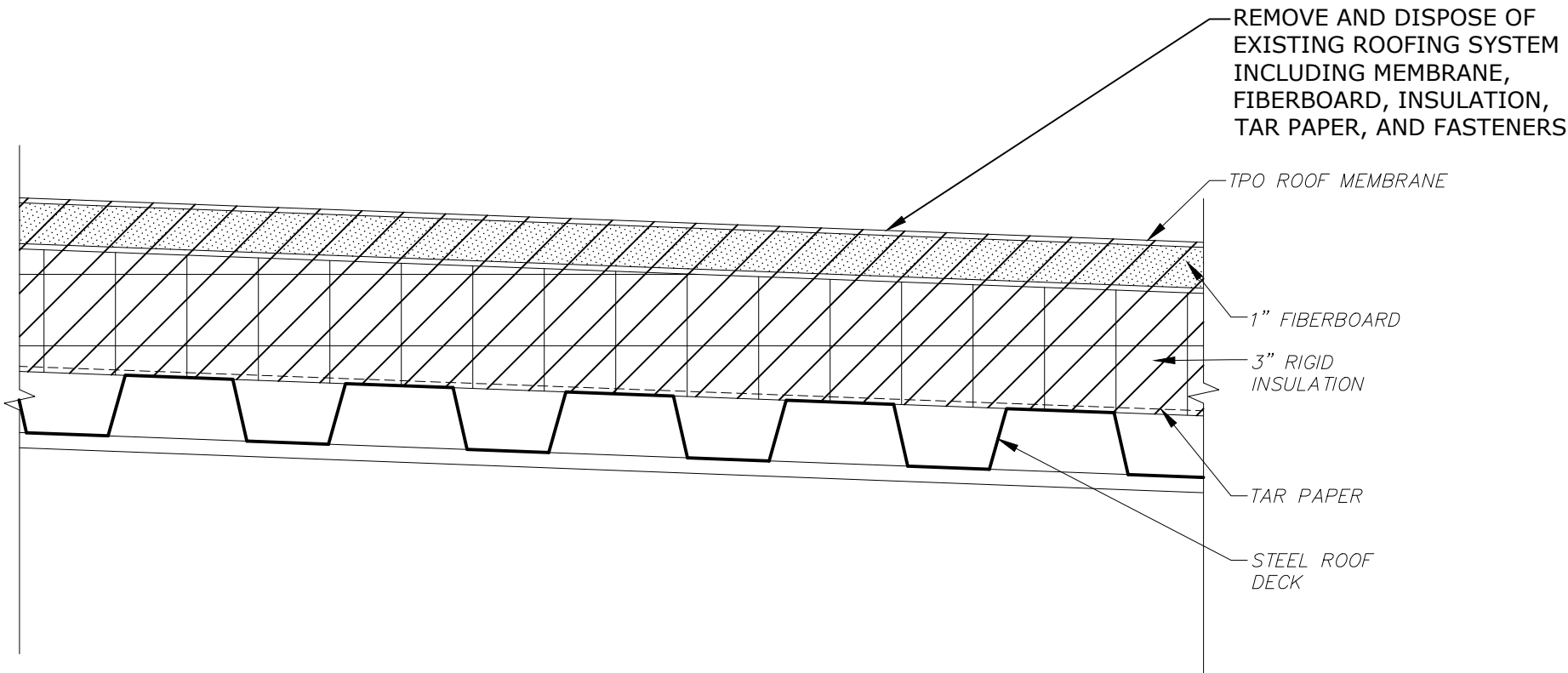
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EXISTING ROOF SLOPE LINE

ITEM TO BE REMOVED/DEMOLISHED

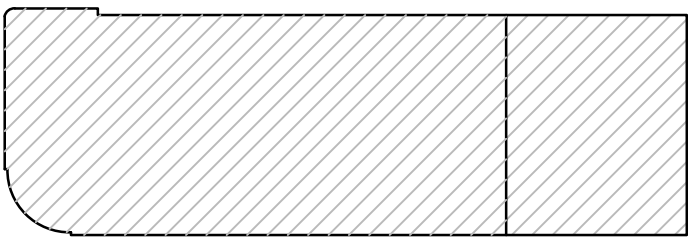
NOTES:

1. REMOVE AND DISPOSE OF ALL EXISTING HVAC EQUIPMENT CURBS.
2. SEE SHEET H-101 FOR HVAC EQUIPMENT REQUIREMENTS.

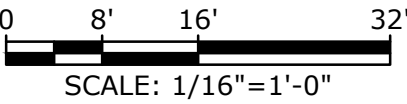


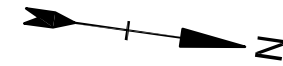
TYPICAL EXISTING ROOF SECTION

DETAIL	1
3" = 1'-0"	-



HORACE MANN KEYPLAN
NO SCALE



**Tighe&Bond**

**SCHEMATIC DESIGN
NOT FOR CONSTRUCTION**

Horace Mann Elementary School Roof Replacement Project

City Of Melrose

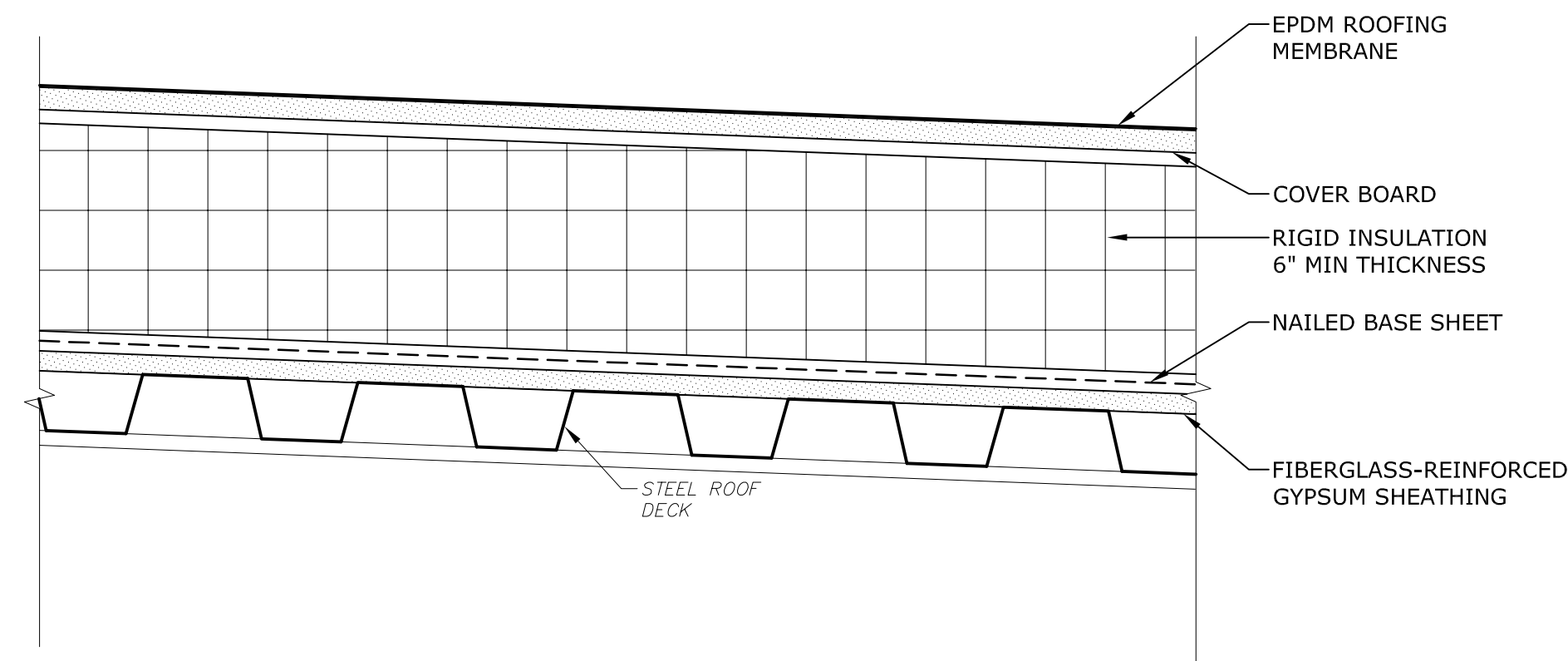
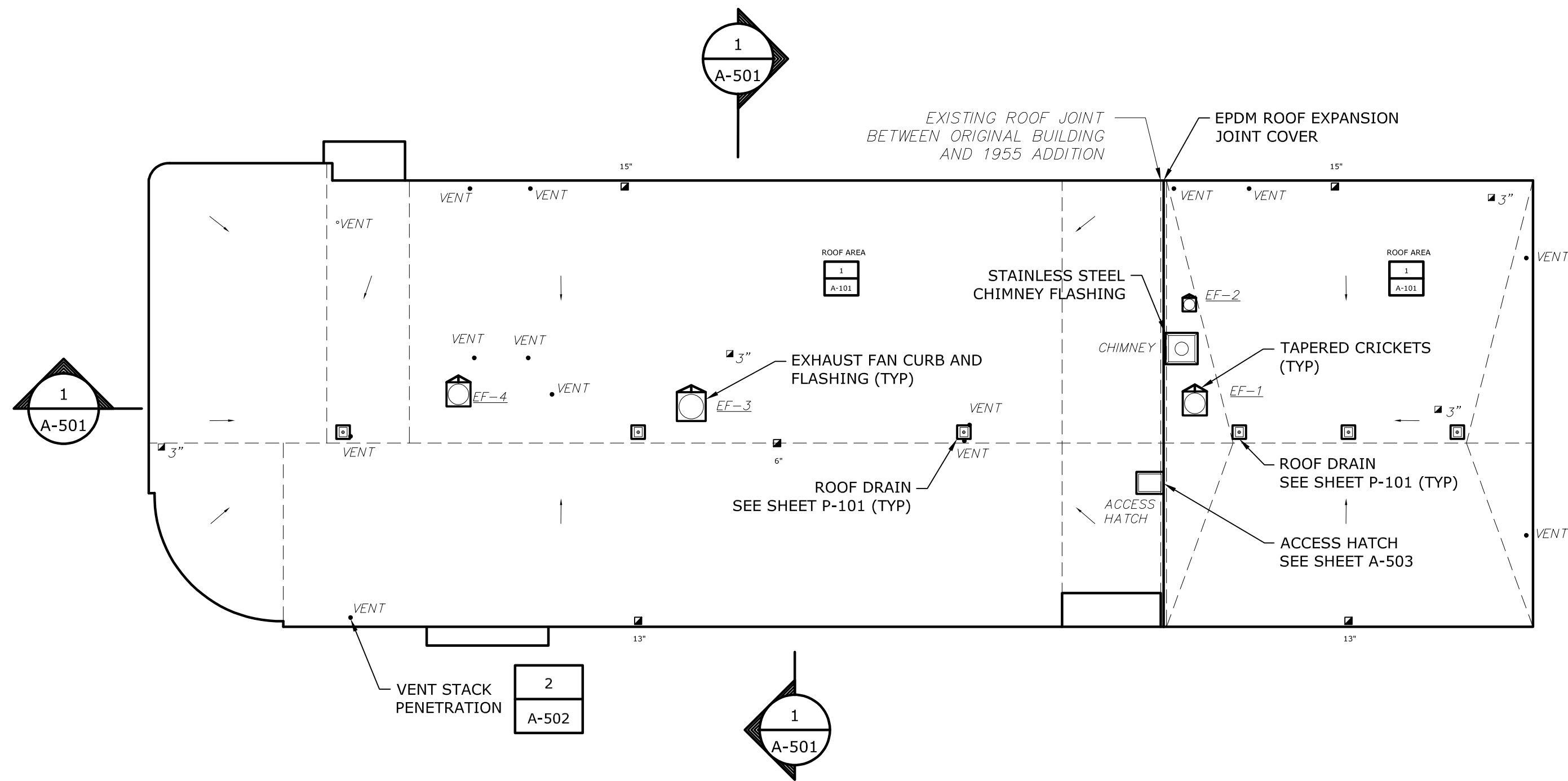
Melrose,
Massachusetts

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DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - A-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		

ROOF PLAN

SCALE: $1/8"=1'-0"$

A-101



TYPICAL PROPOSED ROOF SECTION

DETAIL	1
3" = 1'-0"	-

LEGEND

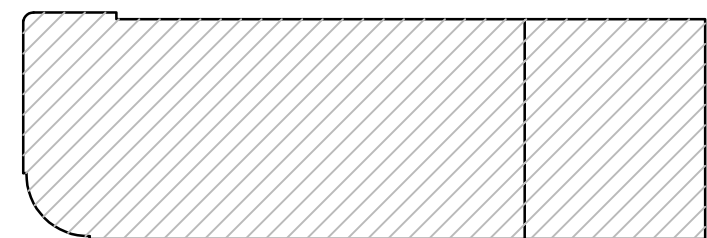
- | | | | |
|---|------------------------------------|---|----------------------------------|
|  | ROOF DRAIN |  | GOOSENECK (INTAKE OR EXHAUST) |
|  | VENT PIPE PENETRATION |  | EXHAUST CAP OR AIR INTAKE |
|  | ROOFTOP EXHAUST FAN/DUCT WITH CURB |  | APPROXIMATE INSULATION THICKNESS |
|  | ROOFTOP EQUIPMENT ON SLEEPERS |  | ROOF SLOPE LINE |
|  | GAS PIPE ON PIPE SUPPORT |  | GUARDRAIL FOR FALL PROTECTION |
| | |  | WALKPAD |
| | |  | ROOF SLOPE DIRECTION |

NOTES:

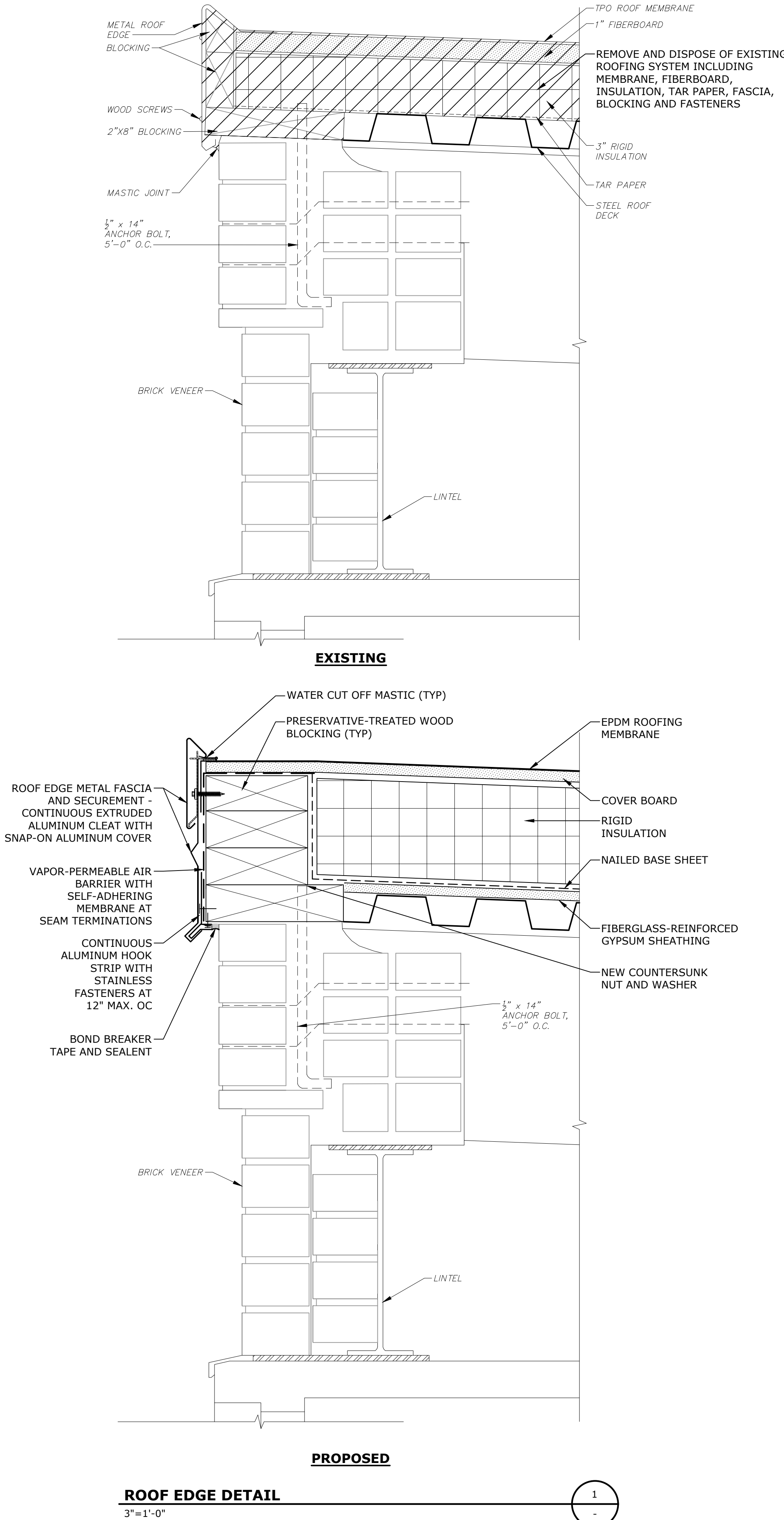
1. INSTALL NEW CURBING FOR ALL HVAC EQUIPMENT. NEW CURBS MUST BE MINIMUM 12" ABOVE NEW ROOFING. INSTALL NEW CRICKETS TO ENSURE PROPER DRAINAGE AT ALL ROOF CURBS.
2. ADJUST ELEVATION OF ROOF EDGES TO MATCH THE MAXIMUM INSULATION THICKNESS AT EACH ROOF DECK ELEVATION TO PROVIDE A LEVEL ROOF PERIMETER.
3. ROOF SLOPE TO BE 1/4" PER FOOT MINIMUM UNLESS NOTED OTHERWISE.
4. FOR SMALL-DIAMETER HVAC PENETRATIONS SEE DETAIL 2/A-502.

HORACE MANN KEYPLAN

NO SCALE



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Tighe & Bond 2:31M1215(026) Melrose Drawings Figures: AutoCAD\Horace Mann School\Sheet\M1215-026-HORACE MANN - A-501.dwg



**Schematic Design
NOT FOR CONSTRUCTION**

**Horace Mann
Elementary
School Roof
Replacement
Project**

City Of Melrose

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO:		M1215-026
DATE:		06/20/2022
FILE:		M1215-026-HORACE MANN - A-501.dwg
DRAWN BY:		AH
CHECKED:		MPW
APPROVED:		JPV
ROOF DETAILS - 1		
SCALE:		AS SHOWN
A-501		

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

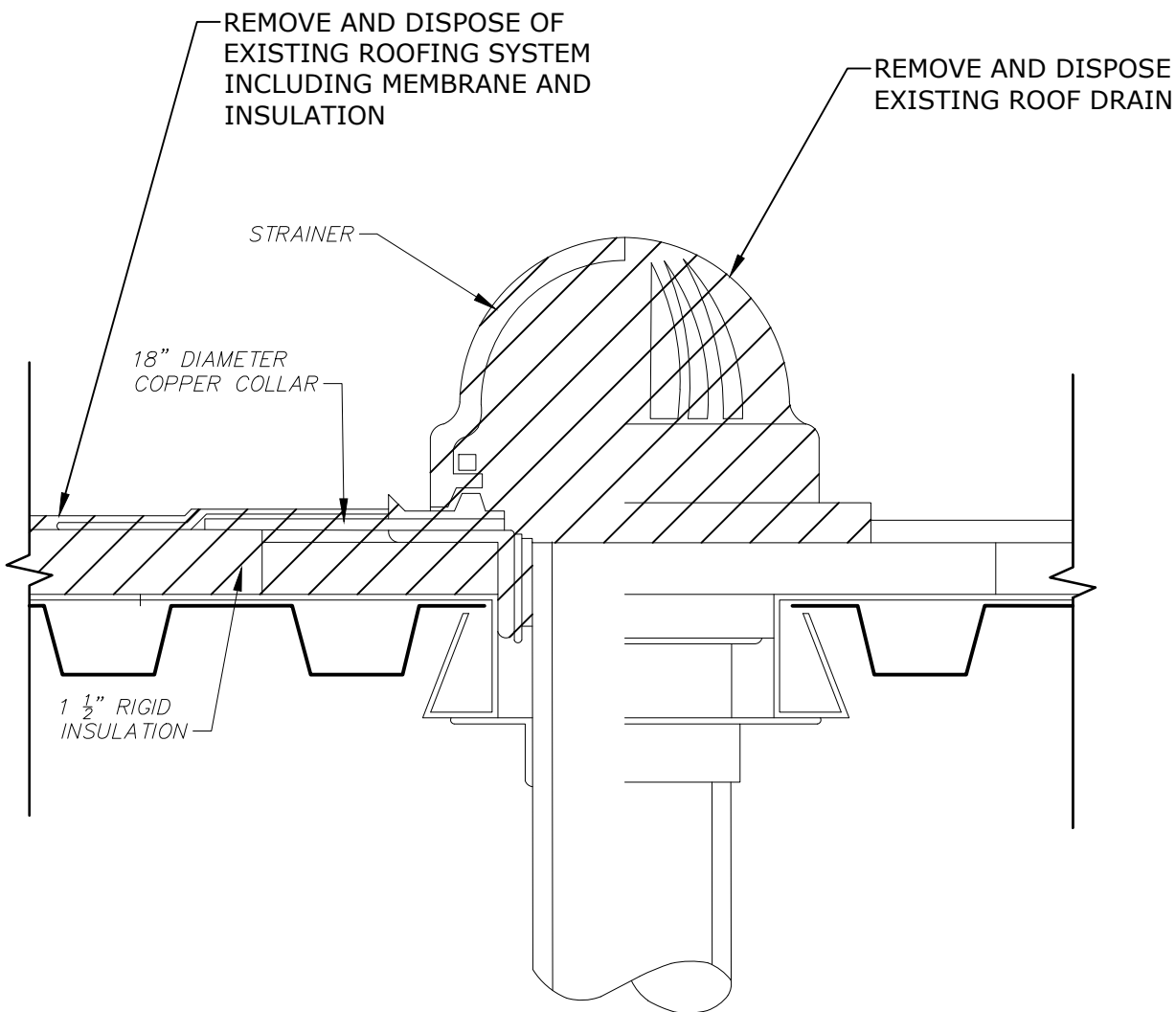
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - A-501.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: JPV		

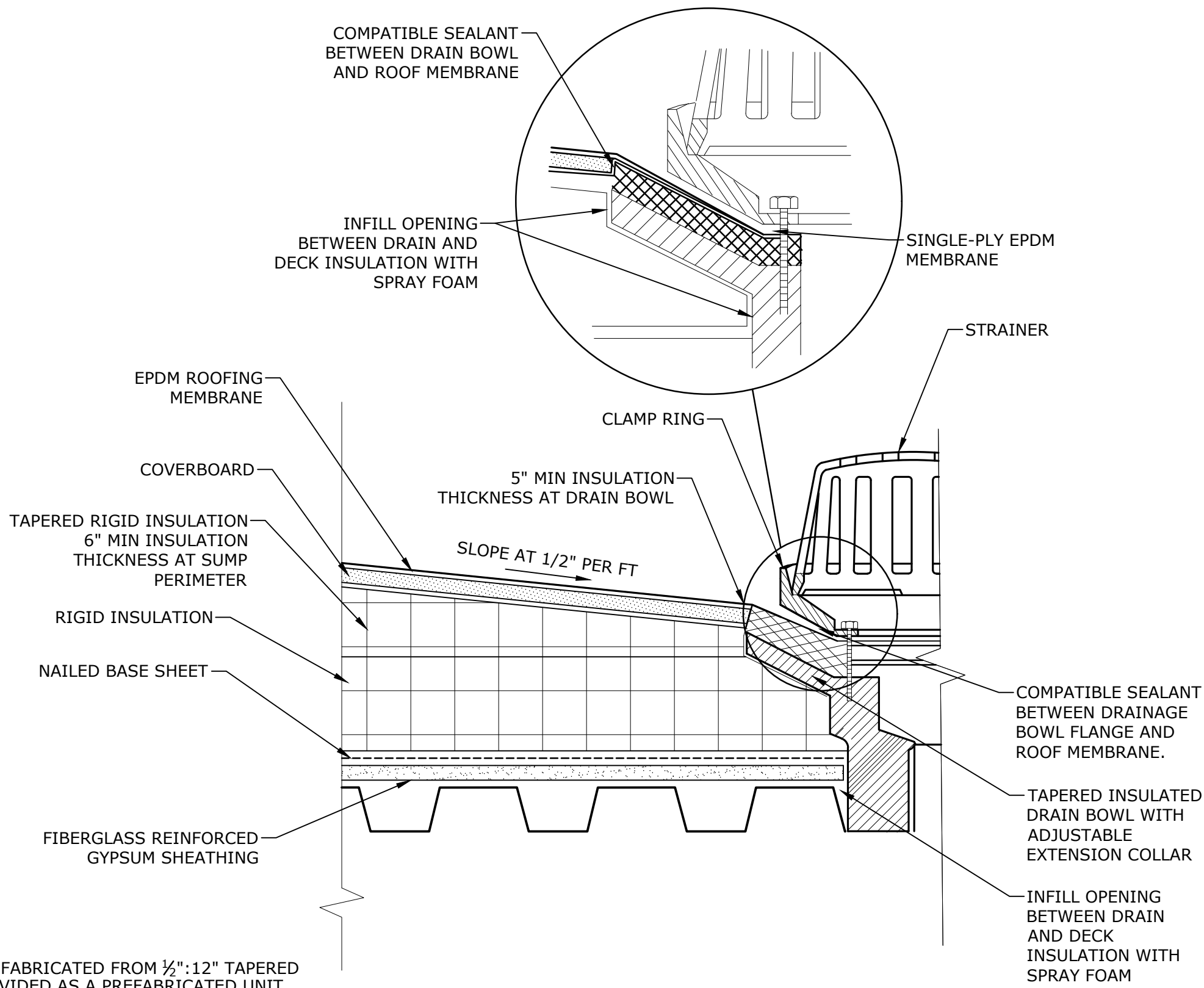
ROOF DETAILS - 2

SCALE: AS SHOWN

A-502



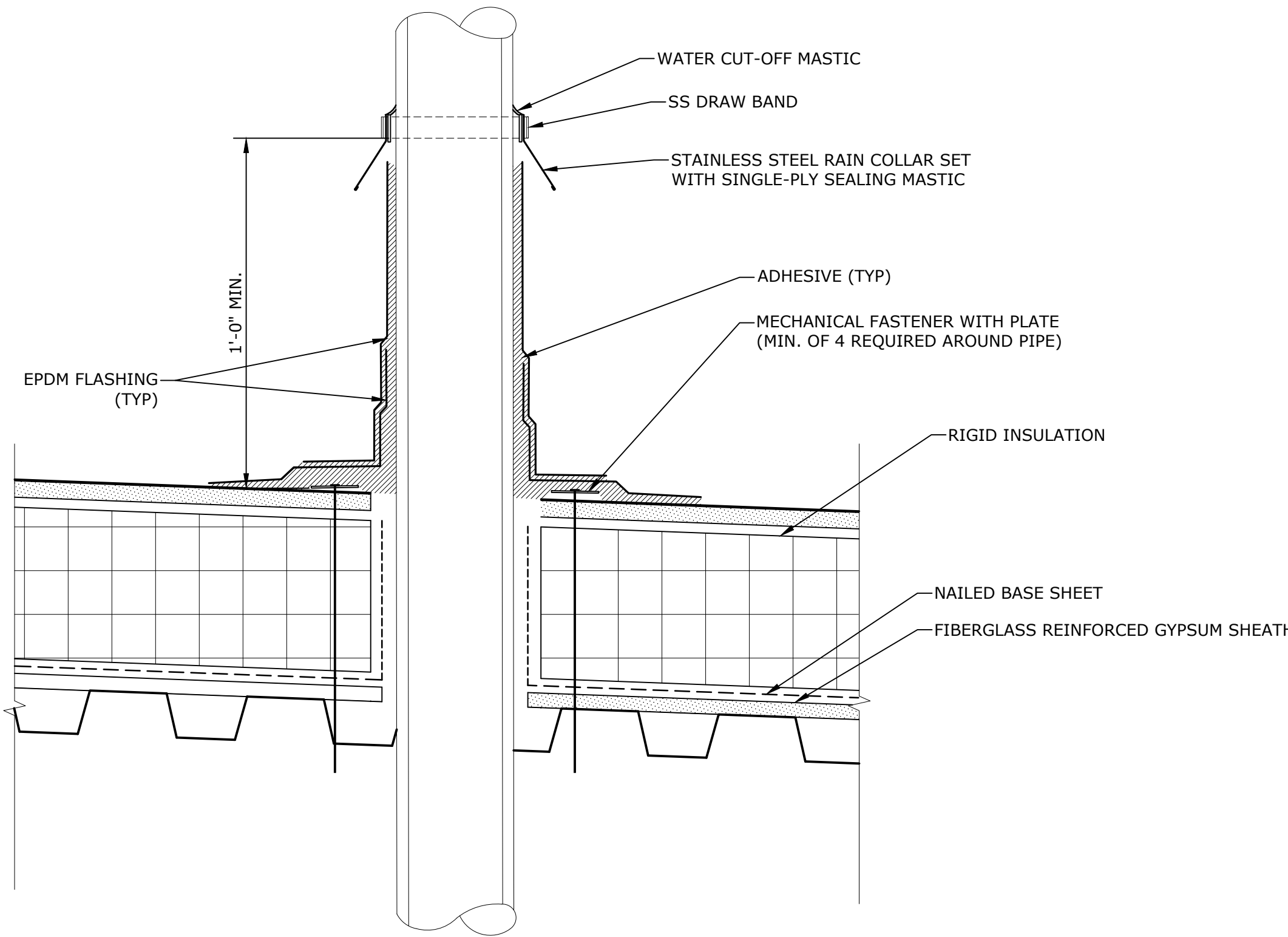
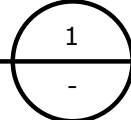
EXISTING



PROPOSED

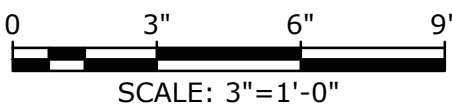
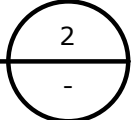
ROOF DRAIN DETAIL

3"=1'-0"



VENT STACK DETAIL

3"=1'-0"



NOTES

1. SUMP MAY BE FIELD-FABRICATED FROM ½":12" TAPERED INSULATION OR PROVIDED AS A PREFABRICATED UNIT.

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

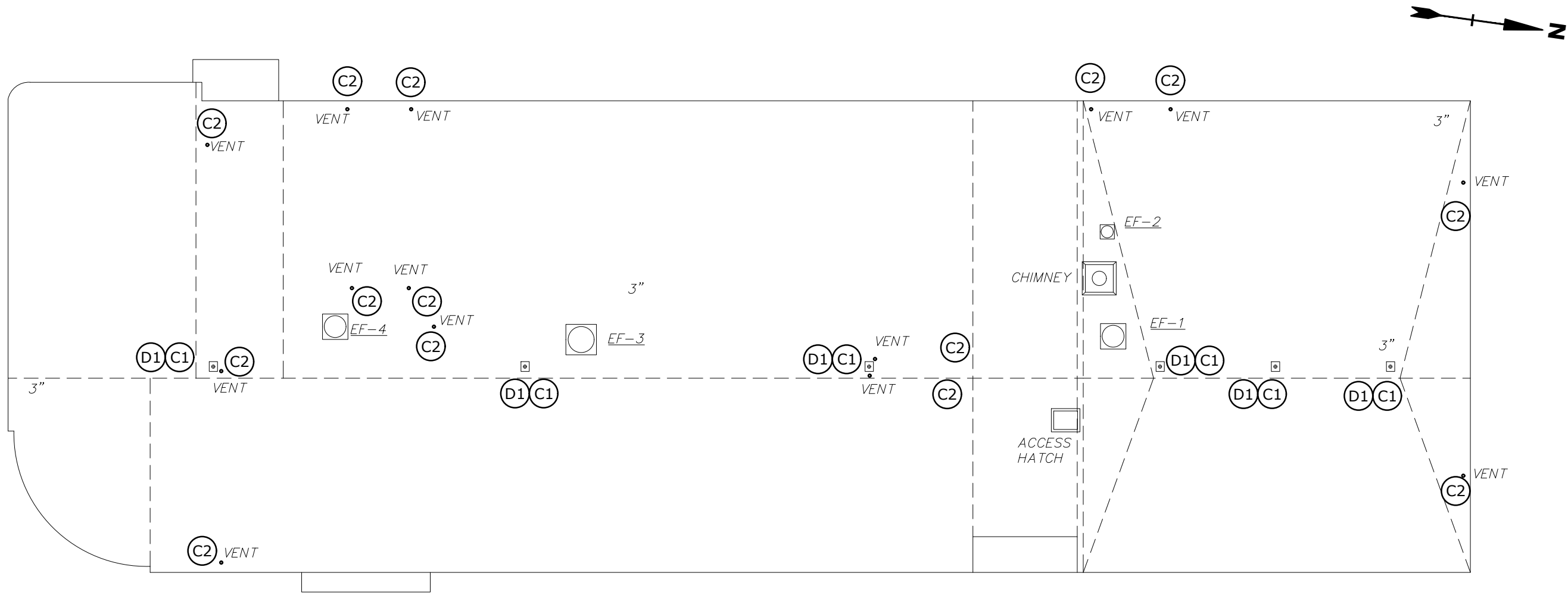
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - P-101.dwg		
DRAWN BY: PL, JM		
CHECKED: MPW		
APPROVED: FJH, JPV		

PLUMBING ROOF PLAN

SCALE: AS SHOWN

P-101



PLUMBING ROOF DEMOLITION PLAN
1/16" = 1'-0"

- LEGEND
- ACCESS HATCH
 - ROOF DRAIN
 - VENT PIPE PENETRATION

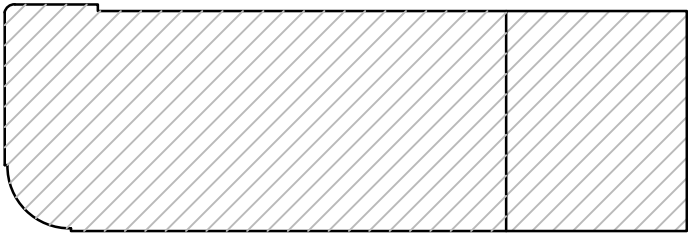
DEMOLITION KEY NOTES

D1 REMOVE EXISTING ROOF DRAINS. CUT AND CAP EXISTING DRAIN PIPING AWAY FROM DRAIN BODY WITHIN BUILDING. PREPARE FOR FUTURE CONNECTION. COORDINATE EXTENT OF DEMOLITION W/ ROOFING CONTRACTOR TO CONFIRM ADEQUATE CLEARANCE FOR NEW ROOFING INSTALLATION IS PROVIDED.

CONSTRUCTION KEY NOTES:

C1 NEW ROOF DRAIN. DRAIN TO MATCH OUTLET SIZE OF 4". CONNECT NEW PIPE TO EXISTING STORM DRAINAGE SYSTEM WITHIN THE BUILDING. INSULATE RD SUMP AND NEW SECTION OF STORM DRAIN PIPING WITH 1-INCH FIBERGLASS INSULATION WITH ASJ. INSULATION THERMAL CONDUCTIVITY TO BE 0.21-0.27 BTU-IN/(h-ft²-°F). VERIFY TIE-IN LOCATION IN FIELD. COORDINATE WITH ROOFING CONTRACTOR AND GC.

C2 CONFIRM VENT SIZE IN FIELD. EXTEND VENT PIPE WITH SAME SIZE TO TERMINATE 24" ABOVE NEW ROOF.



HORACE MANN KEYPLAN
NO SCALE

0 8' 16' 32'
SCALE: 1/16"=1'-0"

SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

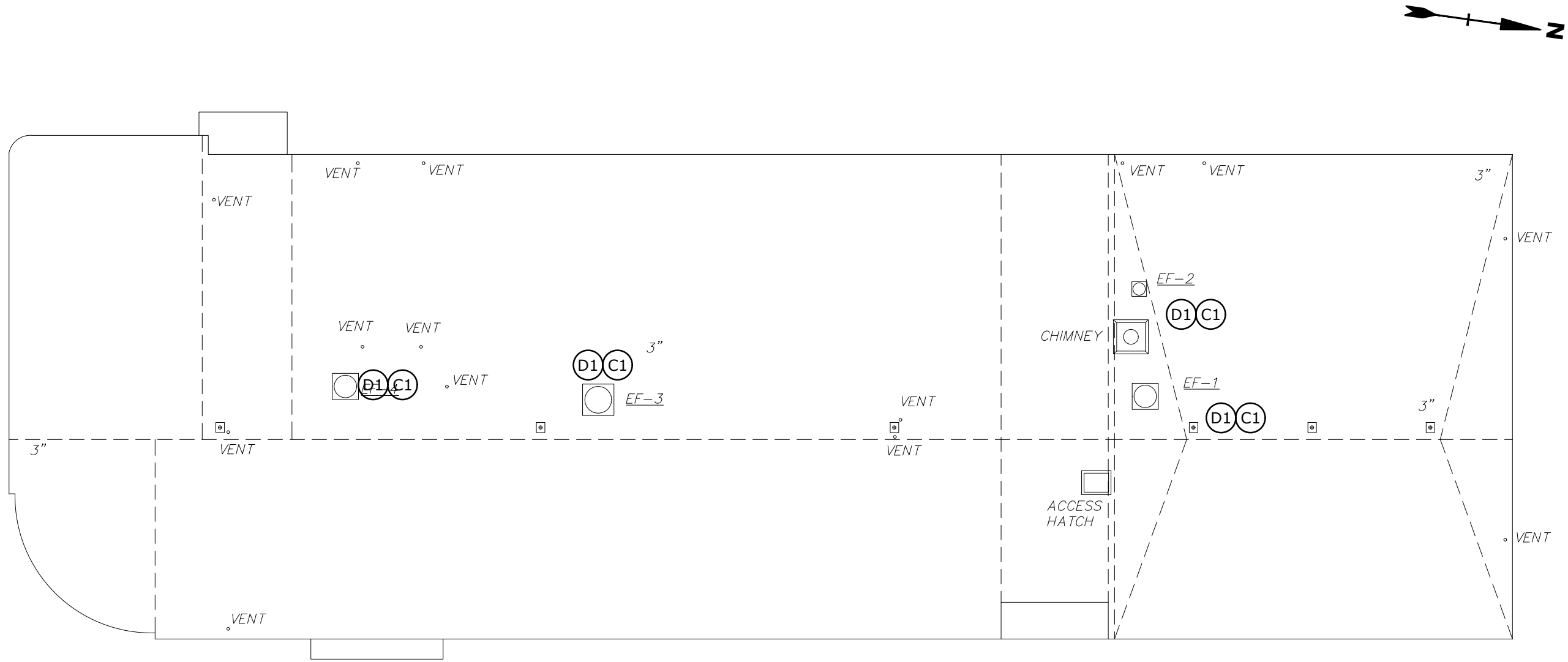
Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - H-101.dwg		
DRAWN BY: PL, JM		
CHECKED: MPW		
APPROVED: FJH, JPV		

HVAC ROOF PLAN

SCALE: AS SHOWN

H-101



LEGEND

- ACCESS HATCH
- EXHAUST FAN

GENERAL NOTES

- VERIFY ALL EXISTING CONDITIONS AND DIMENSIONS PRIOR TO COMMENCEMENT OF WORK. COORDINATE ALL WORK WITH OTHER TRADES.
- THE DRAWINGS ARE DIAGRAMMATIC AND INDICATE THE GENERAL ARRANGEMENT OF SYSTEMS AND WORK INCLUDED IN THE CONTRACT.
- INSTALL EQUIPMENT AND SUPPORTS IN ACCORDANCE WITH ALL RELEVANT BUILDING CODES.
- FIELD VERIFY QUANTITY OF MECHANICAL EQUIPMENT, AND SUPPORTS TO BE REMOVED.
- PERFORM PRE-BALANCE TESTING OF ALL EXHAUST FANS PRIOR TO UNIT REMOVAL, RECORD AIRFLOWS FOR FINAL BALANCING EFFORTS. PROVIDE REPORT TO ENGINEER.
- PROVIDE TEMPORARY CAPS FOR ALL DUCTWORK. NO DUCTWORK SHALL REMAIN OPEN AT ANY TIME.
- DURING DEMOLITION, CONTROL WIRING IS TO BE DISCONNECTED AND PROTECTED FOR FUTURE USES/RECONNECTION.
- ALL MATERIALS, METHODS AND EQUIPMENT INSTALLED MUST BE IN COMPLIANCE WITH PROJECT SPECIFICATIONS AND APPLICABLE CODES.

GENERAL DEMOLITION NOTES

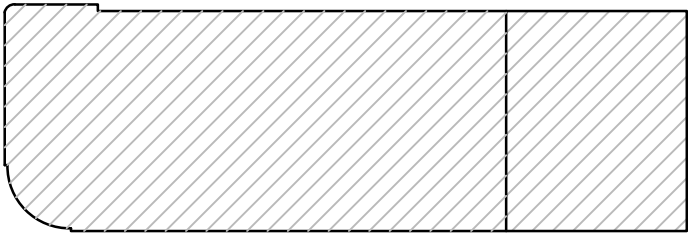
- IT IS NOT THE INTENT OF THESE DOCUMENTS TO SHOW EVERY DEVICE, APPURTENANCE, PIPE, WIRE, OR CONDUIT TO BE REMOVED. HVAC EQUIPMENT, UNITS, AND SYSTEMS NOT BEING REUSED SHALL BE REMOVED IN THEIR ENTIRETY INCLUDING ASSOCIATED SUPPORTS.
- PROPERLY DISPOSE OF DEMOLISHED EQUIPMENT IN COMPLIANCE WITH CODES, REGULATIONS, AND DEP STANDARDS. INVENTORY, SALVAGE AND TURN OVER OR DISPOSE OF EQUIPMENT AT DIRECTION OF OWNER.
- ALL EXISTING SYSTEMS SHALL BE MADE FULLY OPERATIONAL, INCLUDING RECONNECTION TO SERVICES AND DUCTWORK.
- EXISTING EQUIPMENT TO BE REMOVED AND RE-INSTALLED SHALL BE FIELD VERIFIED FOR QUANTITY AND CONDITION. KEEP AN ACCURATE RECORD OF STORED EQUIPMENT INCLUDING CONDITION.
- SYSTEMS REQUIRED TO REMAIN IN OPERATION DURING DEMOLITION SHALL BE CAREFULLY PROTECTED FROM DAMAGE AND CONTAMINATION BY THE CONSTRUCTION PROCESS.

DRAWING DEMOLITION NOTES:

- (D1) DISCONNECT, REMOVE, AND STORE EXHAUST FAN. PROVIDE TEMPORARY CAP OVER DUCT OPENING. DEMOLISH ROOF CURB. MEASURE AIRFLOW OF FAN PRIOR TO UNIT REMOVAL.

DRAWING CONSTRUCTION NOTES:

- (C1) VERIFY ROOF OPENING AND FAN CURB-CAP DIMENSIONS. FURNISH NEW ROOF CURB WITH TRANSITION TO FAN AS REQUIRED (INSTALLED BY GC). CURB TO BE INSULATED AND A MINIMUM 12" ABOVE NEW ROOF. RE-INSTALL REMOVED FAN ON CURB, RECONNECT AND SEAL TO EXISTING DUCTWORK. CONNECT FAN TO EXISTING CONTROLS.



HORACE MANN KEYPLAN

NO SCALE

0 8' 16' 32'
SCALE: 1/16"=1'-0"

Last Saved: 6/27/2022
Plotted On: Jun 27, 2022 2:43pm By: ABS
Tighe & Bond 2:VM1215 (226) Melrose Drawings Figures: AutoCAD\Horace Mann School\Sheet\M1215-026-HORACE MANN - E-101.dwg

GENERAL NOTES:

1. DISCONNECT AND MAKE SAFE THE EXISTING MECHANICAL EQUIPMENT FOR REMOVAL BY HVAC CONTRACTOR. THE EXISTING FEEDER SHALL BE DE-ENERGIZED AND LOCKED OUT FOR THE DURATION OF THE NEW ROOF WORK. RECONNECT EXISTING FEEDER TO EXISTING MECHANICAL EQUIPMENT UPON THE RE-INSTALLATION BY HVAC CONTRACTOR. MODIFY AND EXTEND CONDUIT AND WIRE AS REQUIRED.
2. ALL CONDUIT RUNS ACROSS ROOF SHALL BE REMOVED AND REINSTALLED UPON COMPLETION OF ROOF UNLESS CONDUITS AND WIRE HAVE BEEN ABANDONED IN WHICH CASE THEY SHALL BE REMOVED PERMANENTLY. ELECTRICAL CONTRACTOR SHALL FIELD VERIFY ALL EXISTING CIRCUITING TO ROOF TOP EQUIPMENT.
3. COORDINATE ALL DEVICE LOCATIONS WITH GC AND/OR OWNER PRIOR TO COMMENCEMENT OF WORK.
4. THE LOCATIONS OF EXISTING EQUIPMENT ARE APPROXIMATE. DETERMINE THE EXACT LOCATION OF STRUCTURES BEFORE COMMENCING WORK. BE FULLY RESPONSIBLE FOR ANY AND ALL DAMAGE WHICH MIGHT BE OCCASIONED BY FAILURE TO EXACTLY LOCATE AND PRESERVE ANY AND EQUIPMENT AND STRUCTURES.
5. ALL PANELBOARDS SHOWN ARE LOCATED ON THE BASEMENT FLOOR.

DEMOLITION LEGEND

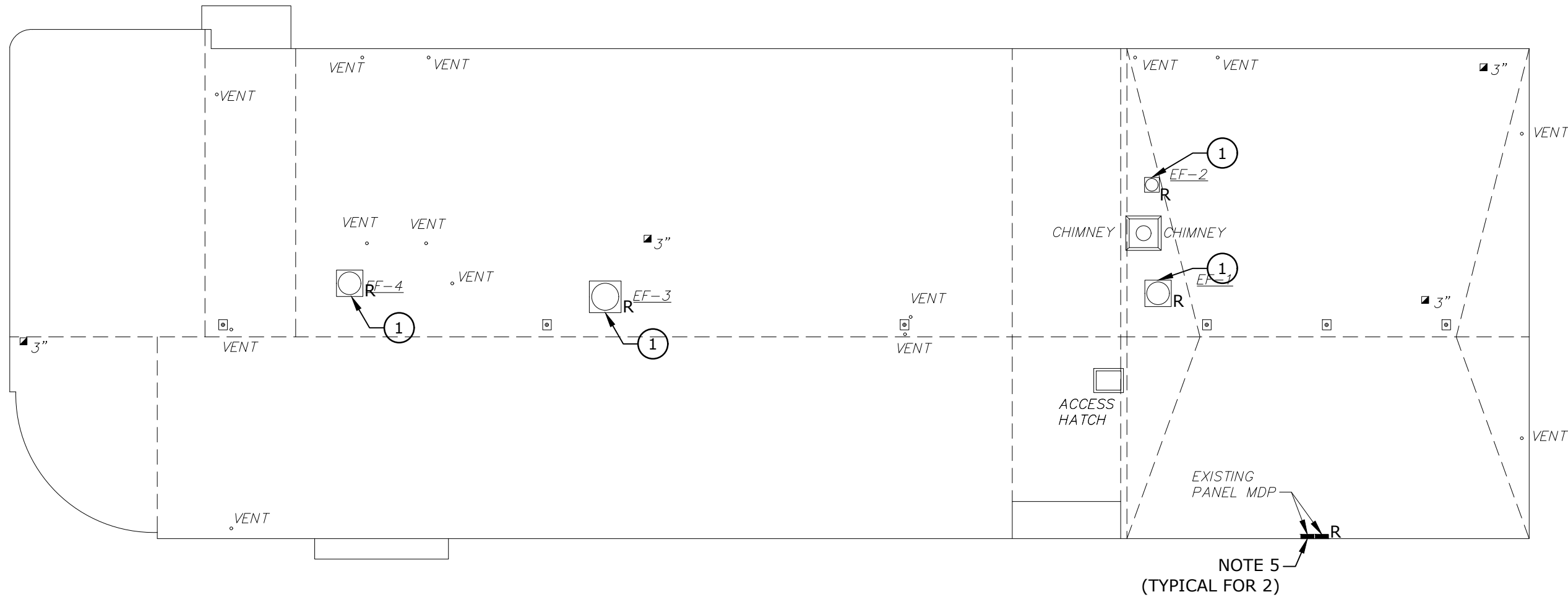
"R" EXISTING DEVICE TO REMAIN ACTIVE AS-IS. SEE GENERAL NOTES FOR ADDITIONAL INFORMATION.

POWER DISTRIBUTION EQUIPMENT

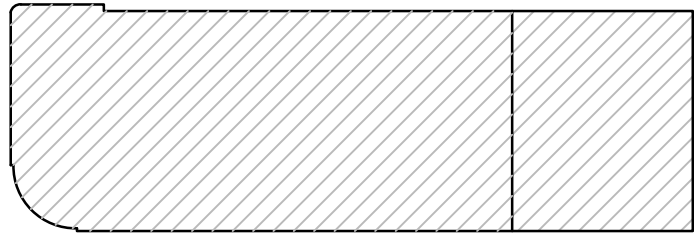
□ PANELBOARD, SURFACE MOUNTED

ELECTRICAL KEY NOTES:

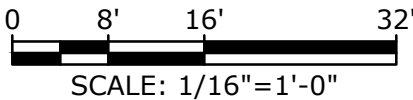
- 1 DISCONNECT EXISTING EQUIPMENT. SECURE CONDUCTORS AND MAKE SAFE FOR ROOF INSTALLATION. LOCK OUT TAG OUT CIRCUIT AT LOCAL OVERCURRENT PROTECTION DEVICE. RECONNECT TO REINSTALLED EQUIPMENT. SEE GENERAL NOTE 1. REFER TO HVAC DRAWINGS FOR DETAILS.



ELECTRICAL ROOF PLAN
1/16" = 1'0"



HORACE MANN KEYPLAN
NO SCALE



SCHEMATIC DESIGN
NOT FOR CONSTRUCTION

Horace Mann
Elementary
School Roof
Replacement
Project

City Of Melrose

Melrose,
Massachusetts

A	06/20/2022	SCHEMATIC DESIGN
MARK	DATE	DESCRIPTION
PROJECT NO: M1215-026		
DATE: 06/20/2022		
FILE: M1215-026-HORACE MANN - E-101.dwg		
DRAWN BY: AH		
CHECKED: MPW		
APPROVED: FJH, JPV		

ELECTRICAL ROOF PLAN

SCALE: AS SHOWN

E-101

**MSBA Accelerated Repair Program
Horace Mann Elementary School
Hoover Elementary School
Roof Replacement project
Melrose, MA**

**Schematic Design Estimate
June 27, 2022**

Tighe & Bond



198 North Washington St, #109, Boston MA 02114



**MSBA Accelerated Repair Program
Roof Replacement project
Melrose, MA
Schematic Design Estimate
BASIS OF ESTIMATE**

6/27/2022

Roof Replacement project

DOCUMENTATION

This estimate was prepared from the following information:

Schematic Design Drawings provided by Tighe & Bond design team, dated June 20, 2022

BASIS FOR PRICING

This estimate reflects the current construction value for the construction of this project and should not be construed as a prediction of a low bid. Prices are based on local prevailing wage construction costs at the time the estimate was prepared.

PROJECT OUTLINE

The project consists of roof replacement at Horace Mann Elementary School and Hoover Elementary School in Melrose, MA.

QUALIFICATIONS

Owner costs and fees are excluded

ITEMS NOT CONSIDERED IN THIS ESTIMATE

Items not included in this estimate are:

- Overtime outside industry standard
- Work outside normal hours of operation
- Preconstruction fees
- Utility Company Charges or Hook-up fees have been excluded
- No permits or special fees have been included
- Third party commissioning costs.
- Owner supplied and/or installed items (e.g.. Draperies, furniture and equipment)
- Loose Furniture and Equipment
- Owner Supplied and Installed Furniture, Fixtures and Equipment
- Relocation / move costs
- Air Quality monitoring / Vibration monitoring
- Loose technology equipment (i.e. Computers, Printers, Etc.)
- The estimate assumes all long-lead items can be pre-purchased to meet schedule requirements.
- The estimate is based on the premise that the design will meet all codes, laws, ordinances, rules, and regulations in effect at the time that the estimate was prepared. The estimate shall be adjusted should any discrepancies between design and the aforementioned codes, laws or ordinances result in, or require, an increase in the Cost 'of the Work
- Items identified in the design as Not In Contract (NIC)
- Builder's Risk insurance, terrorist insurance and other Owner insurances



Roof Replacement project

June 27, 2022

Horace Mann Elementary School

Melrose, MA

Schematic Design Estimate

		13,450 GSF		
		Cost / SF		
02 Existing Conditions		212,272	15.78	26.8%
05 Metals		5,380	0.40	0.7%
06 Wood, Plastics, and Composites		16,656	1.24	2.1%
07 Thermal & Moisture Protection		475,936	35.39	60.1%
22 Plumbing		29,864	2.22	3.8%
23 HVAC		25,226	1.88	3.2%
26 Electrical		25,960	1.93	3.3%
TOTAL DIRECT COST		791,294	58.83	100%
Design Contingency	15.00%	118,694	8.82	
General Conditions and General Requirements	11.50%	104,649	7.78	
Permits and fees	excluded	-	-	
Contractor's OH&P	5.00%	45,499	3.38	
Escalation (midpoint 2Q 2023)	5.00%	53,007	3.94	
Construction Contingency	excluded	-	-	
TOTAL ESTIMATED CONSTRUCTION COST		1,113,143	82.76	



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Horace Mann Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
1	02 Existing Conditions						
2	024100 <i>Selective Demolition</i>						
3	<i>Roof Demolition</i>						
4	Remove and disposed of existing roof - see Hazardous Materials Assessment	13,450	sf		Included		
5	Roof drain remove	2	ea		with plumbing		
6	Remove and dispose of access hatch	1	ea	450.00	450		
7	Existing insulation thickness test cut	4	ea	150.00	600		
8	Remove and dispose of all exiting exhaust fence curb and flashing	62	lf	18.00	1,116		
9	Remove and dispose of chimney flashing	22	lf	6.50	143		
10	Remove and dispose of vent flashing	16	ea	40.00	640		
11	Cutting and patching	1	ls	3,500.00	3,500		
12	Dispose, cart away	1	ls	400.00	400		
13	Temporary roof protection	13,450	sf	1.20	16,140		
14	Dust control	1	ls	4,708.00	4,708		
15	Allowance for overhead protection building entrance below.	150	sf	20.00	3,000		
16							
17	026000 <i>Hazardous Materials Assessment</i>						
18	ACM & PCB Abatement of roof	13,450	sf	13.50	181,575		
19							
20	Subtotal: Existing Conditions					\$ 212,272	
21							
22	05 Metals						
23	051000 <i>Structural Steel Framing</i>						
24	No work show in this section						
25	053000 <i>Metal Decking</i>						
26	Roof deck replacement at Roof B1 damaged areas, assumed 5% of roof area	673	sf	8.00	5,380		
27							
28	Subtotal: Metals					\$ 5,380	
29							
30							
31	06 Wood, Plastics, and Composites						
32	061600 <i>Rough Carpentry</i>						
33	Install new curbing for all HAVC equipment 12" above new roof	56	lf	48.00	2,688		
34	New 3x Pressure treated blocking at roof edge	538	lf	24.00	12,912		
35	Roof curb with two block between original building and 1955 addition	66	lf	16.00	1,056		
36							
37	Subtotal: Wood, Plastics, and Composites					\$ 16,656	
38							
39	07 Thermal & Moisture Protection						
40	075000 <i>Membrane Roofing</i>						
41	<i>New Construction</i>						
42	90 mil EDPM roofing system; 30 year warranty	13,450	sf	30.00	403,500		
43	Tapered crickets	4	ea	80.00	320		
44	New walkway pad, assumed 10% of roof area	1,345	sf	6.50	8,743		
45							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Horace Mann Elementary School

Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
46	076500 <i>Flashing and Sheet Metal</i>						
47	Roof edge metal fascia and securement, continuous extruded aluminum cleat, continuous aluminum hook strip with stainless fasteners	538	lf	49.00	26,362		
48	Snap-on aluminum cover	538	lf	38.00	20,444		
49	New flashing at HAVC equipment curbing	56	lf	14.00	784		
50	Stainless steel chimney flashing	20	lf	32.00	640		
51	Access hatch flashing	16	lf	18.00	288		
52	Vents pipe flashing	12	ea	85.00	1,020		
53	Roof drain flashing	6	ea	350.00	2,100		
54	Misc. roof flashing	1	al	1,500.00	1,500		
55							
56	077100 <i>Roof Specialties</i>						
57	Access hatch	1	ea	4,250.00	4,250		
58							
59	079100 <i>Joint Sealants</i>						
60	Exterior caulking and sealants at all roof penetrations	13,450	sf	0.45	5,985		
61							
62	Subtotal: Thermal & Moisture Protection					\$ 475,936	
63							
64	22 Plumbing						
65	Demolition						
66	Roof drains	6	ea	332.10	1,993		
67							
68	New						
69	Sanitary vent system						
70	Extend vent piping to 24"	14	ea	570.00	7,980		
71							
72	Roof drainage system						
73	Roof drain including new piping/insulation and tie-in to existing, Allowance	6	ea	1,648.50	9,891		Assume 4" drains
74							
75	Materials supply and bidding/market conditions allowance	1	ls	5,000.00	5,000		
76	Supervision/PM	1	ls	5,000.00	5,000		
77							
78	Subtotal: Plumbing					\$ 29,864	
79							

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)



**Roof Replacement project
Melrose, MA
Schematic Design Estimate**

6/27/2022

Horace Mann Elementary School

	Division	Description	Quantity	Unit	Unit Price	Total	Subtotal Trades	Notes
80	23	HVAC						
81		Demolition						
82		Exhaust fans, store on site for reinstallation, Allowance	4	ea	764.10	3,056		
83								
84		New						
85		Exhaust fans, reinstall previously removed	4	ea	1,167.52	4,670		
86								
87		Miscellaneous to include seismic controls and testing/start-up	1	ls	2,500.00	2,500		
88		Materials supply and bidding/market conditions allowance	1	ls	10,000.00	10,000		
89								
90		Supervision/PM	1	ls	5,000.00	5,000		
91		Subtotal: HVAC					\$ 25,226	
92	26	Electrical						
93		Demolition						
94		Disconnect and makes safe exhaust fans, for removal by others	4	ea	300.00	1,200		
95		Re-work/remove/replace any conduit/wire as necessary, Allowance	1	ls	2,000.00	2,000		
96								
97		New						
98		Equipment and machinery power						
99		Extend circuit if necessary and reconnect exhaust fans	4	ea	1,390.02	5,560		
100								
101		Miscellaneous to include seismic controls and testing/start-up	1	ls	700.00	700		
102		Materials supply, small job premium and bidding/market conditions allowance	1	ls	15,000.00	15,000		
103								
104		Supervision/PM	1	ls	1,500.00	1,500		
105								
106		Subtotal: Electrical					\$ 25,960	
107								

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

HORACE MANN ELEMENTARY SCHOOL, MELROSE, MA PRE-RENOVATION HBMA SERVICES

TO: Denise M. Gaffey – Directory and City Planner – City of Melrose
FROM: Frank Rodrigues – Tighe & Bond
COPY: Matthew Wzorek – Tighe & Bond
DATE: June 8, 2022

Tighe & Bond Inc., (Tighe & Bond) has prepared the following technical memorandum to summarize the Hazardous Building Material Assessment (HBMA) conducted at the Horace Mann Elementary School. (the "Site"). A facility improvement project, which includes full replacement of the existing roof is currently proposed for the school building. The current roof systems consists of a rubber membrane roof system with fiberboard insulation applied onto a metal roof deck. The HBMA was limited to the roof area being proposed for renovation impact. As required by state and federal regulations, characterization of various waste streams generated during construction projects must be completed to ensure their proper management.

The Assessment included a visual observation and bulk sampling of suspect hazardous building materials (asbestos, painted/coated building materials), and a visual inventory of other hazardous/regulated wastes (i.e., mercury-containing equipment, refrigerants, PCB-containing equipment, etc.). The HBMA was performed to support the proposed facility improvement project and to address/prepare budgets for management of environmentally related building materials.

Tighe & Bond's assessment and report are subject to the HBMA Limitations provided as Appendix A. The Assessment was performed on May 20, 2022, by Tighe & Bond's Massachusetts licensed asbestos inspector, Francisco J. Rodrigues, (#AI040131). Mr. Rodrigues' inspector license and certification are included as Appendix B of this report.

1 Hazardous Building Materials Assessment

1.1 Asbestos-Containing Building Materials

Prior to any type of building renovation or demolition, a thorough investigation is required to identify and quantify asbestos containing materials (ACM) which may be impacted by the demolition or renovation activities. The survey is required by the United States Environmental Protection Agency (EPA) National Emissions Standard for Hazardous Air Pollutants (NESHAP) regulations (Title 40 CFR, Part 61, Subpart M); Massachusetts Department of Environmental Protection (MassDEP) regulations (310 CMR 7.15); Massachusetts Department of Labor Standards (MADLS) regulations, (454 CMR 28.00); as well as applicable portions of the Occupational Safety and Health Administration (OSHA) asbestos in construction regulations (CFR 1926.1101).

The asbestos assessment was limited to accessible areas of the roof and roof top equipment to determine the presence or absence of suspect ACM that have potential for disturbance during the proposed renovation activities and would be subject to abatement prior to roof replacement.

Suspect materials were divided into "homogeneous materials", building materials which were determined by the inspector to be homogeneous based on their color, texture, and age. A number of bulk samples of suspect ACM from each homogenous group of materials were collected in general accordance with standards described in the Environmental Protection Agency (EPA) Asbestos Hazard and Emergency Response Act (AHERA) Regulations for schools. AHERA sampling protocols are only recommended for use by MassDEP and EPA as they do not regulate bulk sampling standards.

Bulk samples were collected and submitted to Aerobiology Laboratories Associates Inc., (Aerobiology) of Woburn, Massachusetts for analysis via Polarized Light Microscopy with Dispersion Staining (PLM/DS) in accordance with the EPA/600/R-93/116 Method. ProScience is a Massachusetts licensed and American Industrial Hygiene Association (AIHA)-accredited asbestos laboratory.

Suspect materials identified and sampled are included as inventory tables in Appendix C. The tables describes material locations, sample numbers, quantities, condition, analytical results, and specific comments relative to our findings. The asbestos laboratory report is included in Appendix D.

The MassDEP defines a material that contains greater than or equal to one percent ($\geq 1\%$) asbestos utilizing PLM/DS, as being an ACM. Materials that are identified as "none detected" are specified as not containing asbestos. Materials containing less than one percent ($< 1\%$) asbestos are regulated to a degree by OSHA related to work practices, worker exposure, and waste containerization and in Massachusetts, materials containing $< 1\%$ asbestos are considered asbestos-containing waste material (ACWM) and must be packaged and disposed of as ACWM in accordance with 310 CMR 7.15.

A total of nine homogeneous areas were identified during the inspection and 18 samples of suspect ACM were collected. The tar material or hot mop applied to the roof deck in the original section of the roof was determined to contain $< 1\%$ asbestos and therefore is classified as an ACWM.

Samples of other suspect ACM collected during the survey, were determined to be non-asbestos containing. Refer to Appendix C for a list of each suspect material identified and sampled.

Other suspect materials encountered during any renovation activities that are not identified in this report as being non-ACM should be assumed to be ACM until sample collection and laboratory analysis indicate otherwise.

Tighe & Bond recommends the bottommost roofing layer be treated as ACM. The ACMs identified at the Horace Mann School should be removed by a licensed asbestos abatement contractor, utilizing trained and licensed personnel prior to renovation, demolition or any activity that has the potential to disturb these materials. Tighe & Bond recommends the creation of a project specific asbestos abatement scope of work or technical specification for the removal of ACM. The specification must be developed by a Massachusetts licensed asbestos project designer, and it should address such important issues as regulatory requirements, notification procedures, insurance considerations, air sampling needs and other pertinent information. Abatement activities must be subject to a passing post abatement visual inspection by an asbestos monitoring firm not affiliated with the abatement contractor. The same firm typically collects, analyzes and reports the State required post abatement clearance air samples.

The current scope of construction does not call for the removal of the metal roof deck. In the event sections of the roof deck must be cut and replaced Tighe & Bond recommends those sections be removed by a licensed asbestos abatement contractor.

1.2 Universal Waste and Other Regulated Building Waste

Tighe & Bond performed a visual inspection of the proposed renovation areas to identify hazardous materials, universal waste materials or other regulated wastes that have the potential for disturbance during the roof replacement project. No regulated wastes were identified.

Appendices:

APPENDIX A: HBMA Limitations

APPENDIX B: Inspector's Certification

APPENIDX C: Suspect Asbestos Containing Materials Inventory Table

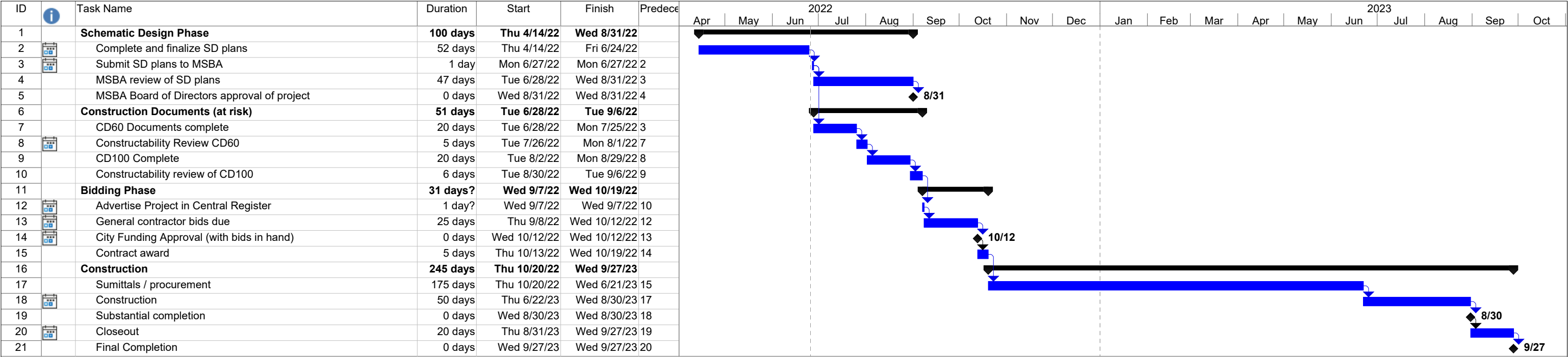
APPENDIX D: Asbestos Laboratory Report

J:\M\M1215\026 Melrose\HBMA\Horace Mann\Final Report\Horace Mann_Tech Memo_Final.docx

**EXHIBIT C
PROJECT SCHEDULE
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

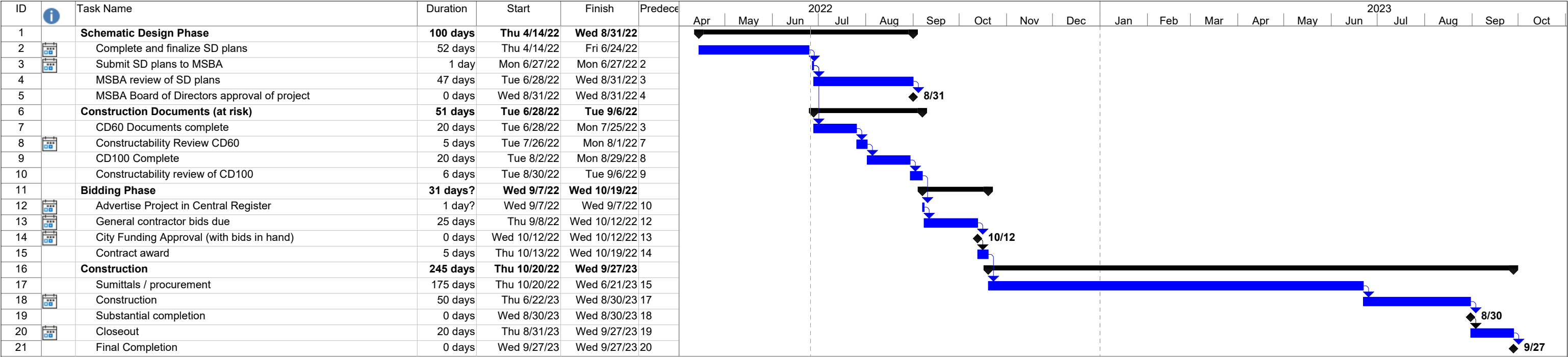
Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT



Hoover Elementary School - Melrose, MA
Date: Sun 6/26/22

Task		Project Summary		Inactive Summary		Manual Summary		External Milestone	
Split		External Tasks		Manual Task		Start-only		Progress	
Milestone		External Milestone		Duration-only		Finish-only		Deadline	
Summary		Inactive Milestone		Manual Summary Rollup		External Tasks			



Horace Mann Elementary School - Melrose, MA
Date: Sun 6/26/22

Task		Project Summary		Inactive Summary		Manual Summary		External Milestone	
Split		External Tasks		Manual Task		Start-only		Progress	
Milestone		External Milestone		Duration-only		Finish-only		Deadline	
Summary		Inactive Milestone		Manual Summary Rollup		External Tasks			

**EXHIBIT D
CASH FLOW
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

Melrose Public Schools Hoover Elementary School - CASH FLOW	Budget	To Date	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Total	Remainin
OPM Feasibility Study	\$7,500	\$7,500																		\$7,500	
A&E Feasibility Study	\$49,100	\$49,100																		\$49,100	
OPM - Construction Contract Documents	\$20,434		\$10,217	\$10,217																\$20,434	
OPM - Bidding	\$8,960				\$4,480	\$4,480														\$8,960	
OPM - Construction Contract Administration	\$101,045						\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000	\$30,000	\$30,000	\$13,545			\$101,045	
OPM - Closeout	\$12,558																	\$6,279	\$6,279	\$12,558	
OPM - Reimbursable & Other Services	\$5,000				\$2,500	\$2,500														\$5,000	
AE - Construction Contract Documents	\$60,400		\$30,200	\$30,200																\$60,400	
AE - Bidding	\$4,400				\$2,200	\$2,200														\$4,400	
AE - Construction Contract Administration	\$34,600						\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$9,000	\$9,000	\$9,000	\$600			\$34,600	
AE - Closeout	\$3,600																	\$1,800	\$1,800	\$3,600	
AE - Hazardous Materials	\$10,700		\$1,500	\$1,500										\$2,700	\$2,500	\$2,500				\$10,700	
Construction Budget	\$1,881,016											\$150,000	\$150,000	\$200,000	\$500,000	\$500,000	\$200,000	\$181,016		\$1,881,016	
Construction Contingency	\$94,051											\$7,500	\$7,500	\$10,000	\$25,000	\$25,000	\$10,000	\$9,051		\$94,051	
Owner's Contingency	\$13,085																	\$7,000	\$6,085	\$13,085	
Total Project Budget	\$2,306,449	\$56,600	\$41,917	\$41,917	\$9,180	\$9,180	\$3,500	\$3,500	\$3,500	\$3,500	\$3,500	\$161,000	\$161,000	\$231,700	\$566,500	\$566,500	\$224,145	\$205,146	\$14,164	\$2,306,449	
Cummulative Cash Out		\$56,600	\$98,517	\$140,434	\$149,614	\$158,794	\$162,294	\$165,794	\$169,294	\$172,794	\$176,294	\$337,294	\$498,294	\$729,994	\$1,296,494	\$1,862,994	\$2,087,139	\$2,292,285	\$2,306,449		

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

Melrose Public Schools Horace Mann Elementary School - CASH FLOW	Budget	To Date	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Total	Remainin
OPM Feasibility Study	\$7,500	\$7,500																		\$7,500	
A&E Feasibility Study	\$40,700	\$40,700																		\$40,700	
OPM - Construction Contract Documents	\$20,434		\$10,217	\$10,217																\$20,434	
OPM - Bidding	\$8,960				\$4,480	\$4,480														\$8,960	
OPM - Construction Contract Administration	\$101,045						\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000	\$30,000	\$30,000	\$13,545			\$101,045	
OPM - Closeout	\$12,558																	\$6,279	\$6,279	\$12,558	
OPM - Reimbursable & Other Services	\$5,000				\$2,500	\$2,500														\$5,000	
AE - Construction Contract Documents	\$41,400		\$20,700	\$20,700																\$41,400	
AE - Bidding	\$4,400				\$2,200	\$2,200														\$4,400	
AE - Construction Contract Administration	\$28,800						\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$8,000	\$8,000	\$8,000	\$1,300			\$28,800	
AE - Closeout	\$3,600																	\$1,800	\$1,800	\$3,600	
AE - Hazardous Materials	\$5,400		\$750	\$750										\$1,500	\$1,500	\$900				\$5,400	
Construction Budget	\$1,113,143											\$50,000	\$50,000	\$100,000	\$300,000	\$300,000	\$200,000	\$113,143		\$1,113,143	
Construction Contingency	\$55,657											\$2,500	\$2,500	\$5,000	\$15,000	\$15,000	\$10,000	\$5,657		\$55,657	
Owner's Contingency	\$11,580																	\$6,000	\$5,580	\$11,580	
Total Project Budget	\$1,460,177	\$48,200	\$31,667	\$31,667	\$9,180	\$9,180	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$55,500	\$55,500	\$124,500	\$354,500	\$353,900	\$224,845	\$132,879	\$13,659	\$1,460,177	
Cummulative Cash Out		\$48,200	\$79,867	\$111,534	\$120,714	\$129,894	\$132,894	\$135,894	\$138,894	\$141,894	\$144,894	\$200,394	\$255,894	\$380,394	\$734,894	\$1,088,794	\$1,313,639	\$1,446,518	\$1,460,177		

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

**EXHIBIT E
PROJECT SITE
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

**Herbert Clark Hoover Elementary School
37 Glendower Road
Melrose, MA 02176**

**Horace Mann Elementary School
40 Damon Ave
Melrose, MA 02176**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

**EXHIBIT F
FURNISHINGS AND EQUIPMENT
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

THERE IS NO EXHIBIT F

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

EXHIBIT G
STANDARD CONSTRUCTION CONTRACT INSURANCE
PROVISIONS FOR AN OWNER-CONTRACTOR CONTRACT
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

EXHIBIT "G"

**MASSACHUSETTS SCHOOL BUILDING AUTHORITY
STANDARD CONSTRUCTION CONTRACT INSURANCE PROVISIONS FOR AN
OWNER-CONTRACTOR CONTRACT
(Alternate Form for Construction Manager at Risk on Page 6 of this Exhibit)**

The District shall include, at a minimum, the following language regarding insurance requirements in the Owner-Contractor contract. The District may impose additional insurance requirements provided that any such additional requirements shall not be inconsistent with the requirements imposed by the standard language set forth herein and further provided that, prior to issuing an invitation for bids for construction of the Project, the District shall give the Authority adequate written notice clearly describing any such additional requirements so that the Authority may, at its discretion, review and comment upon such additional requirements. Any such additional requirements may be set forth in Section 8 of the Insurance Requirements below. It shall be the sole responsibility of the District to determine whether additional insurance requirements are desirable or necessary for the Project and should be included in the Owner-Contractor contract.

INSURANCE REQUIREMENTS (Design-Bid-Build)**1. Insurance Generally.**

A. The Contractor shall purchase and maintain insurance of the type and limits listed in this Article with respect to the operations as well as the completed operations of this Contract. This insurance shall be provided at the Contractor's expense and shall be in full force and effect for the full term of the Contract or for such longer period as this Article requires.

B. All policies shall be written on an occurrence basis and be issued by companies lawfully authorized to write that type of insurance under the laws of the Commonwealth with a financial strength rating of A- or better as assigned by AM Best Company, or an equivalent rating assigned by a similar rating agency acceptable to the Owner, or as otherwise acceptable to the Owner.

C. The Contractor shall submit three originals of each certificate of insurance, acceptable to the Owner, simultaneously with the execution of this Contract. Certificates shall show each type of insurance, insurance company, policy number, amount of insurance, deductibles and/or self-insured retentions, and policy effective and expiration dates. Certificates shall show the Massachusetts School Building Authority (hereinafter "Authority"), the Owner and anyone else the Owner may request as additional insureds as to all policies of liability insurance. Certificates shall specifically note the following:

- that the automobile liability, umbrella liability and pollution liability policies include the Authority and the Owner as additional insureds;
- that all policies include the coverage and endorsements in accordance with the terms and conditions as required by this Contract;
- that none of the coverages shall be cancelled, terminated, or materially modified unless and until thirty (30) days prior notice is given in writing to the Owner and the Authority;
- the Contractor shall submit updated certificates of insurance prior to the expiration of any of the policies referenced in the certificates so that the Owner shall at all times possess certificates indicating current coverage.

D. The Contractor shall file one certified, complete copy of all policies and endorsements with the Owner within sixty (60) days after Contract award. If the Owner is damaged by the Contractor's failure to maintain such insurance and to comply with the terms of this Article, then the Contractor shall be responsible for all costs and damages to the Owner and the Authority attributable thereto.

E. Termination, cancellation, or material modification of any insurance required by this Contract, whether by the insurer or the insured, shall not be valid unless written notice thereof is given to the Owner, and the Authority to the extent that the Authority is an additional insured, at least thirty (30) days prior to the effective date thereof, which shall be expressed in said notice.

F. The Contractor is responsible for the payment of any and all deductibles under all of the insurance required herein. Neither the Owner nor the Authority shall in any instance be responsible for the payment of deductibles, self-insured retentions, or any portion thereof.

2. Contractor's Commercial General Liability.

A. The Contractor shall purchase and maintain general liability coverage on the ISO form CG 00 01 or equivalent, including products and completed operations, on an occurrence basis. The form must be amended to state that the aggregate limit applies on a per location/project basis. The policy shall provide the following minimum coverage to protect the Contractor from claims with respect to the operations performed by Contractor and any employee, subcontractor, or supplier, or by anyone for whose acts they may be liable unless a higher coverage is specified in Section 8 below in which case the Contractor shall provide the additional coverage:

Bodily Injury &	\$1,000,000 each occurrence
Property Damage	\$2,000,000 general aggregate per project
Products & Completed Operations	\$1,000,000 annual aggregate
Personal & Advertising Injury	\$1,000,000 each occurrence
Medical Expenses	\$5,000

B. This policy shall include coverage relating to explosion, collapse, and underground property damage.

C. This policy shall include contractual liability coverage.

D. The completed operations coverage shall be maintained for a period of three (3) years after Substantial Completion and acceptance by the Owner. The Contractor shall provide renewal certificates of insurance to the Owner as evidence that this coverage is being maintained.

E. If the Work includes work to be performed within fifty (50) feet of a railroad, any exclusion for liability assumed under contract for work within fifty (50) feet of a railroad shall be deleted.

F. This policy shall include the Authority, the Owner and anyone else requested by the Owner as additional insureds via endorsements CG 20 10 for ongoing operations and CG 20 37 for completed operations. This policy shall be primary and non-contributory with respect to any other insurance available to additional insureds.

G. The policy shall include endorsement CG 24 04, a Waiver of Subrogation in favor of the Authority and the Owner.

3. Automobile Liability.

A. The Contractor shall purchase and maintain the following minimum coverage with respect to the operations of any owned, non-owned, and hired vehicles including trailers used in the performance of the work, unless a higher coverage is specified in Section 8 below in which case the Contractor shall provide the additional coverage:

Bodily Injury & Property Damage \$1,000,000 combined single limit

B. The policy shall include a CA 99 48 Broadened Pollution Endorsement. If specified in Section 8 below, the Contractor, if hauling contaminants and/or pollutants, must adhere to Sections 29 and 30 of the Motor Carrier Act of 1980, which shall include coverage Form MCS-90.

C. The policy shall name the Authority and the Owner as additional insureds.

D. The policy shall contain a Waiver of Subrogation in favor of the Owner and the Authority.

4. Contractor's Pollution Liability.

The Contractor shall purchase and maintain coverage for bodily injury and property damage resulting from liability arising out of pollution related exposures such as asbestos abatement, lead paint abatement, tank removal, removal of contaminated soil, etc. The insurance policy shall cover the liability of the Contractor during the process of removal, storage, transport and disposal of hazardous waste and contaminated soil and/or asbestos abatement. The policy shall include coverage for on-Site and off-Site bodily injury and loss of, damage to, or loss of use of property, directly or indirectly arising out of the discharge, dispersal, release or escape of smoke, vapors, soot, fumes, acids, alkalis, toxic chemicals, liquids or gas, waste materials or other irritants, contaminants or pollutants into or upon the land, the atmosphere or any water course or body of water, whether it be gradual or sudden and accidental. The policy shall also include defense and clean-up costs. The Authority and the Owner shall be named as additional insureds and coverage must be on an occurrence basis. The amount of coverage shall be as follows unless a higher amount is specified in Section 8 below to this Contract, in which case the Contractor shall provide the additional coverage:

Limit of liability	\$1,000,000 per occurrence
	\$3,000,000 aggregate

5. Worker's Compensation.

A. The Contractor shall provide the following coverage in accordance with M.G.L. c.149 §34A and c.152, as amended, unless a higher coverage is specified in Section 8 below, in which case the Contractor shall provide the higher coverage:

Worker's Compensation	Statutory limits
Employer's Liability	\$ 500,000 each accident
	\$ 500,000 disease per employee
	\$ 500,000 disease policy aggregate

B. If specified in Section 8 below, the policy must be endorsed to cover United States Longshoremen & Harborworkers Act (USLHW), or Maritime Liability.

C. The policy shall contain a Waiver of Subrogation in favor of the Authority and the Owner.

6. Builder's Risk/ Installation Floater/Stored Materials.

Owner may purchase and maintain coverage against loss or damage to the Work included in this Contract. If purchased by Owner, such coverage shall be on an "all risks" or equivalent form and will include a waiver of subrogation in favor of Contractor for loss or damage that occurs during the term of the Project. Owner will be responsible for the payment of any deductible under such coverage.

If specified in Section 8 below , Owner may require the Contractor to purchase and maintain coverage against loss or damage to the Work in accordance with the following requirements:

A. The Contractor shall purchase and maintain coverage against loss or damage on all Work included in this Contract in an amount equal to the Contract Price. Such coverage shall be written on an all risks basis or equivalent form and shall include, without limitation, insurance against perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, terrorism ("certified" and "non-certified"), collapse, earthquake, flood (if the project is not in an "A" or a "V" flood Zone), windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for Architect's and Contractor's services and expenses required as a result of such insured loss. Unless otherwise specified in this Contract, the limits for earthquake and flood shall each be the lesser of the Contract Price or \$10,000,000. This policy and/or installation floater shall include transportation and Stored Materials coverage in an amount equal to the value of the stored materials as required in C. below.

B. When Work will be completed on existing buildings owned by the Owner, the Contractor shall provide an installation floater, in the full amount of the Contract Price. Such coverage shall be written on an all risks basis or equivalent form and shall include, without limitation, insurance against perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, collapse, earthquake, flood (if the project is not in an "A" or a "V" flood Zone), windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for Architect's and Contractor's services and expenses required as a result of such insured loss. Unless otherwise specified in this Contract, the limits for earthquake and flood shall each be the lesser of the Contract Price or \$10,000,000. This policy and/or installation floater shall include transportation and Stored Materials coverage in an amount equal to the value of the stored materials as required in C. below.

C. The Contractor shall maintain insurance on delivered and/or stored material designated to be incorporated in the Work against fire, theft or other hazards. Any loss or damage of whatever nature to such material while stored at an off Site location shall be forthwith replaced by the Contractor at no expense to the Owner or the Authority..

D. The policy or policies shall specifically state that they are for the benefit of and payable to the Authority, the Owner, the Contractor, and all persons furnishing labor or labor and materials for the Contract Work, as their interests may appear. The policy or policies shall list the Authority, the Owner, the Contractor, and Subcontractors of any tier as named insureds.

E. Coverage shall include any costs for work performed by the Designer or any consultant as the result of a loss experienced during the term of this Contract.

F. Coverage shall include permission for temporary occupancy and a Waiver of Subrogation in favor of the Owner and the Authority.

G. Coverage shall be maintained until final acceptance by the Owner of the Work and final payment has been made.

H. A loss under the property insurance shall be adjusted by the Contractor as fiduciary and made payable to the Contractor as fiduciary for the insureds. The Contractor shall pay the subcontractors their just shares of insurance proceeds received by the Contractor and shall require subcontractors to make payments to their sub-subcontractors in similar manner.

7. Umbrella Coverage.

The Contractor shall provide Umbrella Coverage in a form at least as broad as primary coverages required by Sections 2, 3 and 5 of this Article in the following amount unless a higher amount is specified in Section 8 below in which case the Contractor shall provide the higher amount:

<u>Contract Price:</u>	<u>Limit of Liability:</u>
Under \$1,000,000	\$2,000,000 per occurrence
\$1,000,001 -- \$5,000,000	\$5,000,000 per occurrence
\$5,000,001-- \$10,000,000	\$10,000,000 per occurrence
\$10,000,001 and over	\$25,000,000 per occurrence

8. Additional Insurance Requirements

The Contractor shall provide such other and/or additional types and/or amounts of insurance as may be set forth below:

MASSACHUSETTS SCHOOL BUILDING AUTHORITY
STANDARD CONSTRUCTION CONTRACT INSURANCE PROVISIONS FOR A
CONSTRUCTION MANAGER AT RISK CONTRACT

The District shall include, at a minimum, the following language regarding insurance requirements in the Owner-Construction Manager at Risk ("CM") contract. The District may impose additional insurance requirements provided that any such additional requirements shall not be inconsistent with the requirements imposed by the standard language set forth herein and further provided that, prior to issuing an RFQ for construction management at risk services for the Project, the District shall give the Authority adequate written notice clearly describing any such additional requirements so that the Authority may, at its discretion, review and comment upon such additional requirements. Any such additional requirements may be set forth in Section 8 of the Insurance Requirements below. It shall be the sole responsibility of the District to determine whether additional insurance requirements are desirable or necessary for the Project and should be included in the Owner-CM contract.

INSURANCE REQUIREMENTS (CM at Risk)

1. Insurance Generally.

A. The CM shall purchase and maintain the insurance of the type and limits listed in this Article with respect to the operations as well as the completed operations of this Contract. This insurance shall be provided at the CM's expense and shall be in full force and effect for the full term of the Contract or for such longer period as this Article requires.

B. All policies shall be written on an occurrence basis and be issued by companies lawfully authorized to write that type of insurance under the laws of the Commonwealth with a financial strength rating of A- or better assigned by AM Best Company, or equivalent rating assigned by a similar rating agency acceptable to the Owner or as otherwise acceptable to the Owner.

C. CM shall submit three originals of each certificate of insurance, acceptable to the Owner, simultaneously with the execution of this Contract. Certificates shall show each type of insurance, insurance company, policy number, amount of insurance, deductibles and/or self insured retentions, and policy effective and expiration dates. Certificates shall show the Massachusetts School Building Authority (hereinafter "Authority"), the Owner and anyone else that the Owner may request as additional insureds as to all policies of liability insurance. Certificates shall specifically note the following:

- that the automobile liability, umbrella liability and pollution liability policies include the Owner and the Authority as additional insureds;
- that all policies include the coverage and endorsements in accordance with the terms and conditions as required by this construction contract;
- that none of the coverages shall be cancelled, terminated, or materially modified unless and until thirty (30) days prior notice is given in writing to the Owner and the Authority;
- CM shall submit updated certificates prior to the expiration of any of the policies referenced in the certificates so that the Owner shall at all times possess certificates indicating current coverage.

D. The CM shall file one certified complete copy of all policies and endorsements with the Owner within sixty (60) days after Contract award. If the Owner or the Authority is damaged by the CM's failure to maintain such insurance and to comply with the terms of this Article, then the CM shall be responsible for all costs and damages to the Owner and the Authority attributable thereto.

E. Termination, cancellation, or material modification of any insurance required by this Contract, whether by the insurer or the insured, shall not be valid unless written notice thereof is given to Owner, and the Authority to the extent that the Authority is an additional insured, at least thirty (30) days prior to the effective date thereof, which shall be expressed in said notice.

F. The CM is responsible for the payment of any and all deductibles under all of the insurance required below unless the Owner and the Authority specifically provide a written waiver to the CM.

2. CM's Commercial General Liability.

A. The CM shall purchase and maintain general liability coverage on the ISO form CG 00 01 or equivalent, including products and completed operations, on an occurrence basis. The form must be amended to state that the aggregate limit applies on a per location/per project basis. The policy shall provide the following minimum coverage to protect the CM from claims with respect to the operations performed by CM and any employee, subcontractor, or supplier, unless a higher coverage is specified in Section 8 below, in which case the CM shall provide the additional coverage:

Bodily Injury &	\$1,000,000	each occurrence
Property Damage	\$2,000,000	general aggregate, per project
Products & Completed Operations	\$1,000,000	annual aggregate
Personal & Advertising Injury	\$1,000,000	each occurrence
Medical Expenses	\$5,000	

B. This policy shall include coverage relating to explosion, collapse, and underground property damage.

C. This policy shall include contractual liability coverage.

D. The completed operations coverage shall be maintained for a period of three (3) years after Substantial Completion and acceptance by the Owner. The CM shall provide renewal certificates of insurance to the Owner as evidence that this coverage is being maintained.

E. If the Work includes work to be performed within fifty (50) feet of a railroad, any exclusion for liability assumed under contract for work within fifty (50) feet of a railroad shall be deleted.

F. This policy shall include the Authority, the Owner and anyone else requested by the Owner as additional insureds via endorsements CG 20 10 for ongoing operations and CG 20 37 for completed operations. This policy shall be primary and non-contributory with respect to any other insurance available to additional insureds.

G. The policy shall include endorsement CG 24 04, a Waiver of Subrogation in favor of the Owner and the Authority.

3. Automobile Liability.

A. The CM shall purchase and maintain the following minimum coverage with respect to the operations of any owned, non-owned, and hired vehicles including trailers used in the performance of the work, unless a higher coverage is specified in Section 8 below, in which case the CM shall provide the additional coverage:

Bodily Injury & Property Damage \$1,000,000 combined single limit

B. The policy shall include a CA 99 48 Broadened Pollution Endorsement. If specified in Section 8 below, the CM, if hauling contaminants and/or pollutants, must adhere to Sections 29 and 30 of the Motor Carrier Act of 1980, which shall contain coverage Form MCS-90.

C. The policy shall name the Owner and the Authority as additional insureds.

D. The policy shall contain a Waiver of Subrogation in favor of the Owner and the Authority.

4. Contractor's Pollution Liability.

The CM shall purchase and maintain coverage for bodily injury and property damage resulting from liability arising out of pollution related exposures such as asbestos abatement, lead paint abatement, tank removal, removal of contaminated soil, etc. The insurance policy shall cover the liability of the CM during the process of removal, storage, transport and disposal of hazardous waste and contaminated soil and/or asbestos abatement. The policy shall include coverage for on-Site and off-Site bodily injury and loss of, damage to, or loss of use of property, directly or indirectly arising out of the discharge, dispersal, release or escape of smoke, vapors, soot, fumes, acids, alkalis, toxic chemicals, liquids or gas, waste materials or other irritants, contaminants or pollutants into or upon the land, the atmosphere or any water course or body of water, whether it be gradual or sudden and accidental. The policy shall also include defense and clean-up costs. The Owner and the Authority shall be named as additional insureds and coverage must be on an occurrence basis. The amount of coverage shall be as follows unless a higher amount is specified in Section 8 below, in which case the CM shall provide the additional coverage:

Limit of liability	\$1,000,000 per occurrence
	\$3,000,000 aggregate

5. Worker's Compensation.

A. The CM shall provide the following coverage in accordance with M.G.L. c.149 §34A and c.152 as amended, unless a higher coverage is specified in Section 8 below, in which case the CM shall provide the higher coverage:

Workers' Compensation	Statutory limits
Employer's Liability	\$ 500,000 each accident
	\$ 500,000 disease per employee
	\$ 500,000 disease policy aggregate

B. If specified in Section 8 below the policy must be endorsed to cover United States Longshoremens & Harborworkers Act (USLHW), or Maritime Liability for \$1,000,000/\$1,000,000.

C. The policy shall contain a Waiver of Subrogation in favor of the Owner and the Authority.

6. Builder's Risk/ Installation Floater/Stored Materials.

Owner may purchase and maintain coverage against loss or damage to the Work included in this Contract. If purchased by Owner, such coverage shall be on an "all risks" or equivalent form and will include a waiver of subrogation in favor of CM for loss or damage that occurs during the term of the Project. Owner will be responsible for the payment of any deductible under such coverage.

If specified in Section 8 below, Owner may require the CM to purchase and maintain coverage against loss or damage to the Work in accordance with the following requirements:

A. The CM shall purchase and maintain coverage against loss or damage on all Work included in this Contract in an amount equal to the GMP. Such coverage shall be written on an all risks basis or equivalent form and shall include, without limitation, insurance against perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, terrorism ("certified" and "non-certified"), collapse, earthquake, flood (if the project is not in an "A" or a "V" flood Zone), windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for Architect's, Program Manager's and CM's services and expenses required as a result of such insured loss. Unless otherwise specified in this Contract, the limits for earthquake and flood shall each be the lesser of the Contract Price or \$10,000,000. This policy and/or installation floater shall include transportation and Stored Materials coverage in an amount equal to the value of the stored materials as required in **C.** below.

B. When Work will be completed on existing buildings owned by the Owner, the CM shall provide an installation floater, in the full amount of the Contract Price. Such coverage shall be written on an all risks basis or equivalent form and shall include, without limitation, insurance against perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, collapse, earthquake, flood (if the project is not in an "A" or a "V" flood Zone), windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any applicable legal requirements, and shall cover reasonable compensation for Architect's, Program Manager's and CM's services and expenses required as a result of such insured loss. Unless otherwise specified in this Contract, the limits for earthquake and flood shall each be the lesser of the Contract Price or \$10,000,000. This policy and/or installation floater shall include transportation and Stored Materials coverage in an amount equal to the value of the stored materials as required in **C.** below.

C. The CM shall maintain insurance on delivered and/or stored material designated to be incorporated in the Work against fire, theft or other hazards. Any loss or damage of whatever nature to such material while stored at some approved off Site location shall be forthwith replaced by the CM at no expense to the Owner or the Authority.

D. The policy or policies shall specifically state they are for the benefit of and payable to the Authority, the Owner, the CM, subcontractors and all persons furnishing labor or labor and materials for the Contract Work, as their interests may appear. The policy or policies shall list the Authority, the Owner, the CM, and Subcontractors of any tier as named insureds.

E. Coverage shall include any costs for work performed by the Designer or any consultant as the result of a loss experienced during the term of this Contract.

F. Coverage shall include permission for temporary occupancy and a Waiver of Subrogation in favor of the Owner and the Authority.

G. Coverage shall be maintained until final acceptance by Owner of the Work and final payment has been made.

H. A loss under the property insurance shall be adjusted by CM as fiduciary and made payable to the Contractor as fiduciary for the insureds. CM shall pay the subcontractors their just shares of insurance proceeds received by the CM and shall require subcontractors to make payments to their sub-subcontractors in similar manner.

7. Umbrella Coverage.

The CM shall provide Umbrella Coverage in form at least as broad as primary coverages required by Sections 2, 3 and 5 of this Article in the following amount unless a higher amount is specified in Section 8 below in which case the CM shall provide the higher amount:

<u>Contract Price:</u>	<u>Limit of Liability:</u>
Under \$1,000,000	\$2,000,000 per occurrence
\$1,000,000 -- \$5,000,000	\$5,000,000 per occurrence
\$5,000,001-- \$10,000,000	\$10,000,000 per occurrence
\$10,000,001 and over	\$25,000,000 per occurrence

8. Additional Insurance Requirements

The CM shall provide such other and/or additional types and/or amounts of insurance as may be set forth below:

**EXHIBIT H
EDUCATIONAL PROGRAM
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

THERE IS NO EXHIBIT H

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

**EXHIBIT I
REIMBURSEMENT RATE CERTIFICATION
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

MSBA Accelerated Repair Program Reimbursement Rate Certification Calendar Year 2021

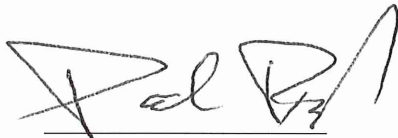
Melrose

MSBA Reimbursement Rate Calculation

Base Points	31.00
Income Factor	5.05
Property Wealth Factor	13.26
Poverty Factor	0
MSBA Reimbursement Rate	49.31

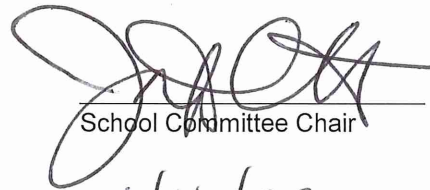
Certification

By signing this Reimbursement Rate Certification, I hereby certify that I have read, understand, and accept the reimbursement rate set forth above, and I hereby acknowledge and agree on behalf of the Eligible Applicant that the above-stated reimbursement rate is the rate that will be used to calculate the maximum Total Facilities Grant for the proposed project.



Local Chief Executive Officer

6/16/2022
Date



School Committee Chair

6/16/22
Date



Superintendent of Schools

6/16/2022
Date

**EXHIBIT J
ELECTRONIC PAYMENT FORM
CITY OF MELROSE
HERBERT CLARK HOOVER ELEMENTARY SCHOOL AND
HORACE MANN ELEMENTARY SCHOOL**

Attachment: 2021 Melrose PFA Exhibits (ORDER-2023-28 : Hoover School Roof Replacement)

PROJECT FUNDING AGREEMENT

(Please print on District letterhead)

Banking Information Template

_____ District hereby instructs the Massachusetts School Building Authority make grant payments via electronic ACH directly to the following account:

MSBA Project ID#*: _____

***All future project payments will be made to this account unless the MSBA receives specific instructions to distribute payments to a separate account for each project.**

District Contact Name: _____

Signature: _____

District Telephone No.: _____

Banking Information for ACH Transactions

Financial Institution Name: _____

Financial Institution Address: _____

City & State: _____

Account No.: _____

Transit Number (ABA#): _____
(Routing #)

Please return the completed form to Xingzhen (Stephanie) Bai:

- via email at Xingzhen.Bai@MassSchoolBuildings.org

An acknowledgment of receipt of a new Banking Information Template will be sent to the Eligible Applicant, Treasurer or Business Manager, and District Contact listed on the form.

[illegible]

CHART - 1	City of Melrose				
DRAFT	Ten Year General Fund Debt Plan Review				
11/7/2022	Department of Finance				
				Projected	
	Year	Net Debt	5% Limit	Budget	Percent
	2022	\$2,855,696	\$4,550,026	\$91,000,522	3.14%
	2023	\$2,839,293	\$4,762,804	\$95,256,080	2.98%
	2024	\$3,052,377	\$4,905,688	\$98,113,762	3.11%
	2025	\$3,837,908	\$5,052,859	\$101,057,175	3.80%
	2026	\$4,088,286	\$5,204,445	\$104,088,891	3.93%
	2027	\$3,802,371	\$5,360,578	\$107,211,557	3.55%
	2028	\$3,809,834	\$5,521,395	\$110,427,904	3.45%
	2029	\$3,581,714	\$5,687,037	\$113,740,741	3.15%
	2030	\$3,322,418	\$5,857,648	\$117,152,963	2.84%
	2031	\$3,330,845	\$6,033,378	\$120,667,552	2.76%
	Totals:	\$34,520,742	\$52,935,857		
	Average:	\$3,452,074	\$5,293,586		
	Variance:		\$1,841,512		
Note(s):	1. It is the current policy of the City of Melrose that the G/F net				
	non-exempt debt budget equate to approx. 5% of the Operating Budget.				
	2. The figures proposed can only be "estimates". Actual figures				
	will be developed as interest rates are locked in.				

Ghobrial, Andrew

From: Golden, Kerriann
Sent: Friday, October 28, 2022 12:42 PM
To: Grigoraitis, Jennifer
Cc: Dello Russo, Patrick; Phillips, Shannon; Latta, Polina; Ghobrial, Andrew; Cinella, Christopher
Subject: RE: Request for additional documentation for orders 2023-29, 2023-30, 2023-31
Attachments: 8404ContractStabilizationHistory.pdf; 2006-221 Creation of Contractual Obligations S&W Stabilization Fund.pdf

Good Morning Councilor Grigoraitis,

Patrick and I are providing the information for the questions below that are relevant to our piece. Attached please find a 10 year history of the Contract Stabilization Fund. This fund was established by the Council Order attached 06-221.

-Contract Stabilization was established by Council Vote 06-221 and in accordance with MGL Chapter 40, Section 5B.
 -Water Retained Earnings and Sewer retained earnings were established under MGL Chapter 44, Section 53F ½ for Enterprise Funds.

There are no CBAs that are restricted from using the Contractual Obligations and Salary & Wages Stabilization Fund.

For orders 2023-30 and 2023-31- Yes, these raises will be retro to the start of Fiscal Year 2023. For the FY 2023 budget, Steps and longevity changes were budgeted. Appropriation Orders 2023-30 and 2023-31 represent the COLA negotiated with both Local 272 Clerical and Local 272 Laborers.

Thanks
 Kerri
 Assistant City Auditor
 City of Melrose
 562 Main Street
 Melrose, MA 02176

From: Grigoraitis, Jennifer <jgrigoraitis@CityofMelrose.org>
Sent: Monday, October 24, 2022 11:27 AM
To: Latta, Polina <platta@CityofMelrose.org>; Dello Russo, Patrick <PDelloRusso@CityofMelrose.org>; Phillips, Shannon <sphillips@CityofMelrose.org>
Cc: Ghobrial, Andrew <aghobrial@CityofMelrose.org>; Cinella, Christopher <ccinella@CityofMelrose.org>
Subject: Request for additional documentation for orders 2023-29, 2023-30, 2023-31

Good morning,

My understanding is that some combination of the three of you will be before the Appropriations & Oversight Comm to speak to these three orders. In advance of that meeting (which I know Andrew is working to get scheduled), I would like to receive the following additional information:

Attachment: Request for additional documentation for orders 2023-29, 2023-30, 2023-31 (ORDER-2023-30 : An Appropriation from Contract

- ten-year history of all approved withdrawals from the contract stabilization account and indication of what was approved (e.g., in X year the council approved Y amount to go toward funding retro raises for Z collective bargaining agreement)
- Copy of the compensation study completed by the consultant any any related documents
- A list of any identified non-union positions that are currently identified for a compensation adjustment under order 2023-29 to maintain compliance with the MA Equal Pay Act
- List of all positions by job title and department slated to be adjusted under the 2023-29 funding request
 - For these positions, total current annual compensation, inclusive of stipends, COLAs ,and any other monetary compensation paid out of all City funds (operating and enterprise)

Additional questions (that I am happy to discuss beforehand and also anticipate asking in the meeting):

- What is the stated purpose for the contract stabilization, water retained earnings, and sewer retained earnings funds? Is this stated purpose set by: state statute/charter/city admin/all of the above?
- Are there any collective bargaining units within the City (including those under MPS) that are not eligible to access the contract stabilization fund? If so, why?
- Orders 2023-30 and 2023-31 reference that the funding request is for FY 23 funding for a union contract. When was this contract settled? Are these raises retro to the start of the fiscal year? Were any of these raises budgeted for in the current FY 23 budget, or is the totality of the increases being absorbed through the stabilization and retained earnings fund?

Thank you.

Best,

Jen

[Jen Grigoraitis, she/her/hers](#)

[Ward 6 Councilor, City of Melrose](#)

****CITY OF MELROSE PUBLIC RECORDS NOTICE: Please be advised that the Massachusetts Attorney General has determined that email is a public record unless the content of the email falls within one of the stated exemptions under the Massachusetts Public Records Laws.****

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****CITY OF MELROSE PUBLIC RECORDS NOTICE: Please be advised that the Massachusetts Attorney General has determined that email is a public record unless the content of the email falls within one of the stated exemptions under the Massachusetts Public Records Laws.****

Established Council Order 06-221 in accordance with MGL Chapter 40, Section 5B		
8404 Contract Stabilization		
Detail	Description	Funding Orders
Opening Balance Fiscal year 2013		
2014-74	Clerical - 1 Year	(17,104.23)
2015-102	Library 1 Year	(12,343.95)
2016-55	Laborers 1 Year	(73,241.53)
2016-56	Laborers 1 Year Cemetery	(19,718.89)
2017-39	Fire 2 Years	(369,520.22)
2017-36	Clerical - 1 Year	(9,593.40)
2017-109	Patrol 2 Years	(213,259.09)
2018-55	Library 1 Year	(13,000.00)
2018-152	Fire 1 Year	(103,750.00)
2019-52	Police 1 Year	(101,827.00)
2020-17	City Solicitor - Liquor Commission stipend	(5,000.00)
2020-18	Clerical - 1 Year	(61,138.14)
2022-42	Fire - 2 Years	(317,693.00)
		(1,317,189.45)



CITY OF MELROSE
In Board of Aldermen

June 5, 2006

AN ORDER
06-221

Creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund", in accordance with Massachusetts General Laws Chapter 40, Section 5B

Offered by Mayor Robert J Dolan
BE IT ORDERED

that, the creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" Number 8404, in accordance with Massachusetts General Laws Chapter 40, Section 5B be, and hereby is passed.

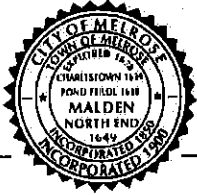
PASSED

JUN - 5 2006
[Signature]
President of the Board of Aldermen

APPROVED

JUN - 7 2006
[Signature]
MAYOR

Attachment: 2006-221 Creation of Contractual Obligations S&W Stabilization Fund (ORDER-2023-30 : An Appropriation from Contract



CITY OF MELROSE

Melrose, 25 ^{MA} June 2006

The Committee on

Appropriations

To Which Was Referred Paper No.

06-221

Entitled

Creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund", in accordance with Massachusetts General Laws Chapter 40, Section 5B

REPORTS as Follows:

that it recommends passage of the Order.

For the Committee

Robert A. Boisselle

Chairman

**CITY OF MELROSE**

MELROSE CITY HALL
562 Main Street
Melrose, Massachusetts 02176

ROBERT J. DOLAN
Mayor

Telephone: (781) 979-4444
Fax: (781) 662-2188

May 11, 2006

To the Honorable Board of Aldermen:

I respectfully request the creation of a new stabilization fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" in accordance with Massachusetts General Laws Chapter 40, Section 5B

Robert J. Dolan
MAYOR

GUIDELINES:**I. MULTIPLE STABILIZATION FUNDS****A. Creation of Funds**

Stabilization funds may be created for one or more different purposes. G.L. Ch. 40 §5B. A fund may be created for a broad category of spending purposes, *e.g.*, any lawful purpose, capital budget purposes or purposes for which the community may borrow money. It may also be created for a specific purpose or project, *e.g.*, acquire a new fire truck or undertake a particular school construction project.

Creation of a fund requires a ~~(two-thirds vote)~~ of the legislative body of the city, town or district. The vote must clearly define the purpose(s) of the fund.

B. Pre-existing Fund

Any pre-existing stabilization fund balance should continue to be treated as a reserve for any lawful purpose, *i.e.* a "general" stabilization fund. The city, town or district can reallocate or earmark all or part of that balance to any new stabilization funds it creates by a vote to transfer monies from that "general" stabilization fund to the newly created fund. See Section I-D below.

C. Changing Fund Purpose

The purpose of a stabilization fund may be changed at any later time by a two-thirds vote of the legislative body. For example, if a community had established a fund in order to reserve monies to acquire a new fire truck and a balance remains after the purchase, the legislative body could vote to change the purpose to meet some new savings objective.

If a Proposition 2½ levy limit override was approved for the purpose of funding the particular stabilization fund, however, the city or town must also follow the referendum procedure explained in Section II-C below to be able to change the fund purpose and then continue using the additional levy capacity resulting from that override in future years.

D. Appropriations and Transfers

Appropriations into and from any stabilization fund require a two-thirds vote of the legislative body.

**CITY OF MELROSE**

MELROSE CITY HALL
562 Main Street
Melrose, Massachusetts 02176

Telephone: (781) 979-4444
Fax: (781) 662-2111

ROBERT J. DOLAN
Mayor

May 11, 2006

To the Honorable Board of Aldermen:

I respectfully request the creation of a new stabilization fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" in accordance with Massachusetts General Laws Chapter 40, Section 5B

Robert J. Dolan
MAYOR

PUBLIC HEARINGS

Public Hearing Set _____

Melrose Free Press _____

MMTV _____

Public Works Notified _____

Utilities Notified _____

Abutters Notified _____

Post Call _____

Invoice _____

LICENSES

Sent Fire ☐ CORI ☐

Building ☐ Health ☐

Wts. & Meas. ☐ Police ☐

Rec'd Fire ☐ CORI ☐

Building ☐ Health ☐

Wts. & Meas. ☐ Police ☐

Class II Bond ☐

Workers Comp Affidavit ☐

CLAIMS

Auditor ☐ City Solicitor ☐

Public Works ☐ _____ ☐

_____ ☐ _____ ☐

emailed to department heads ☒

Ordinances changes: _____

Mailed to General Code ☐

Copy to Book ☐

APPOINTMENTS

Letter ☐ Oath ☐

No 06-22 / original date May 15, 2006

In Board of Aldermen

Referred to Committee on

Appropriations

Creation of a new Stabilization Fund entitled
"Contractual Obligations and Salary & Wages
Stabilization Fund", in accordance with
Massachusetts General Laws Chapter 40, Section
5B

JUN 05 2006

Passed as amended ☐ Passed ☒

Rule _____ suspended ☐ Defeated ☐

Immediate consideration ☐ Place on file ☐

Reconsideration defeated ☐ Reconsidered ☐

Leave to withdraw ☐ Tabled ☐

Granted, adopted, confirmed ☐ Recommended ☐

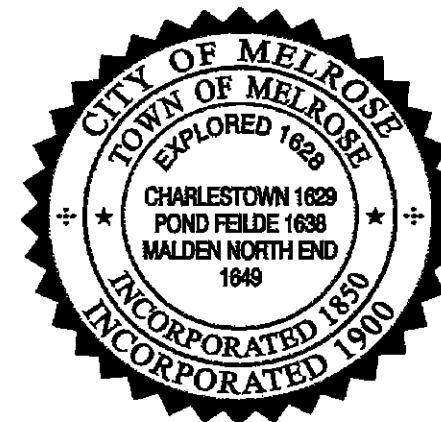
Null & Void ☐

Ordained Roll Call ☐ Yea ☐ Nay

Mary Rita O'Shea
Clerk

Aldermen	Yea
Boisselle	☒
Brodeur	☒
Buonopane	☒
Conn	☒
Forbes	☒
Heavey	☒
Mortimer	☒
Seaboyer	☒
Tramontozzi	☒
Wright	☒
Infurna, Pres.	☒

TOTAL	10	0
-------	----	---





CITY OF MELROSE

Legal Department

Shannon Phillips
City Solicitor
SPhillips@cityofmelrose.org

City Hall, 562 Main Street
Melrose, Massachusetts 02176
Telephone - (781) 979-4184

To: Honorable Melrose City Council

From: Shannon Phillips, City Solicitor

Re: ***Order 2023-30 and Order 2023-31***

Date: November 3, 2022

Dear Honorable Council Members:

The two above-referenced orders are before you as the result of successor contracts being reached with two of our City Unions- Laborers' 272 and Clerical 272- effective Fiscal Year 23 to Fiscal Year 25- beginning June 27, 2022 and ending June 29, 2025.

Memorandum of Agreements were executed by the Unions (after ratification votes) and the City the end of September 2022, subject only to funding of the economic items by the Melrose City Council.

As a result, the above-referenced orders are requesting funding for pay due to the members of both Unions for Fiscal Year 23.

The major economic terms agreed upon in these contracts are as follows:

Clerical Union Financial Highlights:

- Cost of living adjustments: FY23- 2%; FY24-1.75%, FY25- 1.75%
- Second and third years of contract one new step will be added to the salary schedule which will be 2% higher than the previous step in an effort to retain senior staff by providing for salary growth.
- Effective FY23 all elementary school nurses move up one group to Group 14 (same as other school nurses)- at the step closest to but higher than their current rate of pay in an effort to maintain internal equity and retain such hard to fill positions.

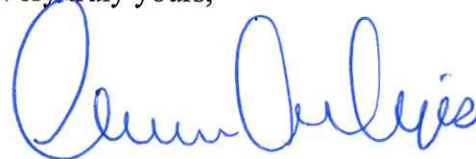
- Effective FY23 move all clerical jobs listed in Group 9 to Group 10 to the step closest to but higher than their current rate of pay. This was done to make the lowest paid union positions more competitive within the labor market and attract and retain employees.

Laborers' Union Financial Highlights:

- Cost of living adjustments as follows: FY23- 1.75%; FY24-1.75%, FY25- 1.75%
- One new step will be added on salary schedule, 2% higher than the previous step, each year of the contract in an effort to retain senior staff by providing for salary growth.

I will be present at Monday night's Appropriation and Oversight Committee meeting to answer any questions you may have.

Very truly yours,



Shannon Phillips

FY23 CLASSIFICATION PLAN	
City of Melrose	
Grade / Position	
6	
	<i>No Positions Assigned</i>
7	
	<i>No Positions Assigned</i>
8	
	Administrative Assistant-PT (Veterans, Recreation, Police)
	Event Operations Assistant - Memorial Hall
	Pine Banks Laborer
9	
	Animal Control Officer - PT
	Assistant Parks Superintendent
	Human Resources Assistant
	Program Coordinator - MA in Motion
	Program Coordinator - Tobacco/Alcohol
	Recreation Coordinator
10	
	Assistant to the Director of Inspectional Services
	Executive Assistant to City Solicitor
	Executive Office Manager - Police
	Finance Administrator - Fire Dept./Public Safety
	Milano Center Manager (COA)
11	
	Assistant City Clerk
	Clerk of Committees
	Finance Manager (Auditing)
	Public Health Specialist
12	
	Cemetery Administrator
	Communication and Community Outreach Coordinator
	Emergency Management Director
	Local Building Inspector (Certified)
	Plumbing and Gas Inspector
	Sealer of Weights and Measures
	Project Engineer
	Water-Sewer Administrator (Billing)
	Wiring Inspector
13	
	Assistant Library Director/Head of Technical Services
	Assistant Treasurer
	Building Systems Supervisor - DPW
	Human Resources Coordinator
	Project/ Systems Administrator
	Senior Planner
	Sustainability Manager
	Systems Analyst IT (city and schools) - networks/databases

FY23 CLASSIFICATION PLAN
City of Melrose
Grade / Position
14
Veterans Services Director (Regional Position)
15
Director of Economic Recovery and Business Development
16
Assistant Director of IT
Executive Director Melrose Memorial Hall
City Clerk
17
Deputy City Engineer
Financial Systems Analyst/Project Manager (Auditor/IT Depts.)
Recreation Director
Superintendent of Parks (Mount Hood. Golf Course,Open Space)
18
Assistant Auditor
Council on Aging Director
Executive Director - Melrose Retirement System
Facilities Manager - City and Schools
Operations Manager - DPW
19
Assistant Director - DPW Administration and Finance
Chief Assessor
City Engineer
Director of Community Development and Planning
Director of Inspectional Services/Building Commissioner
Director of Strategic Initiatives and Communications
Health Director (Regional)
Library Director
Treasurer/Collector
20
Assistant City Solicitor
21
Chief Information Officer (city and schools) / IT Director
Human Resources and Labor Relations Director
22
<i>No Positions Assigned</i>
23
Chief Financial Officer and City Auditor
City Solicitor - Labor Counsel
Director of Public Works

MELROSE CONSOLIDATED CNU PROPOSED FY2023 PAY PLAN

Step Grade	1	2	3	4	5	6	7	8	9	10
8	20.91	21.33	21.76	22.20	22.64	23.09	23.55	24.02	24.50	24.99
9	27.54	28.09	28.65	29.22	29.80	30.40	31.01	31.63	32.26	32.91
10	31.62	32.25	32.90	33.56	34.23	34.91	35.61	36.32	37.05	37.79
11	34.75	35.45	36.16	36.88	37.62	38.37	39.14	39.92	40.72	41.53
12	38.25	39.02	39.80	40.60	41.41	42.24	43.08	43.94	44.82	45.72
13	40.80	41.62	42.45	43.30	44.17	45.05	45.95	46.87	47.81	48.77
14	42.84	43.70	44.57	45.46	46.37	47.30	48.25	49.22	50.20	51.20
15	44.68	45.57	46.48	47.41	48.36	49.33	50.32	51.33	52.36	53.41
16	48.96	49.94	50.94	51.96	53.00	54.06	55.14	56.24	57.36	58.51
17	50.75	51.76	52.80	53.86	54.94	56.04	57.16	58.30	59.47	60.66
18	52.79	53.84	54.92	56.02	57.14	58.28	59.45	60.64	61.85	63.09
19	54.88	55.97	57.09	58.23	59.39	60.58	61.79	63.03	64.29	65.58
20	57.63	58.78	59.96	61.16	62.38	63.63	64.90	66.20	67.52	68.87
21	62.99	64.24	65.52	66.83	68.17	69.53	70.92	72.34	73.79	75.27
22	66.10	67.42	68.77	70.15	71.55	72.98	74.44	75.93	77.45	79.00
23	75.07	76.57	78.10	79.66	81.25	82.88	84.54	86.23	87.95	89.71



HUMAN RESOURCES SERVICES, INC.
Management Consultants to Local Government

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CITY OF MELROSE, MASSACHUSETTS



COMPENSATION AND CLASSIFICATION STUDY
Non-Union Positions

FINAL REPORT

April, 2022



HUMAN RESOURCES SERVICES, INC.
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 Andover, Massachusetts 01810
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April, 2022

Mayor Paul Brodeur
 City of Melrose
 562 Main Street
 Melrose, MA 02176

Dear Mayor Brodeur,

Human Resources Services, Inc. (HRS) is pleased to present this ***Compensation and Classification Study for Non-Union employees*** to the City of Melrose, MA. This report represents the culmination of a detailed position classification and compensation review for all non-union employees engaged in a variety of municipal work activities. This report, along with the Organizational Needs Assessment Report submitted separately provides the City of Melrose with the totality of the analysis as it was conducted for the City. The City had made the decision that the two elements (comp/class and organization review) of the consulting engagement should be developed for better efficiency and implementation.

In particular, we wish to thank the Human Resources and Labor Relations Director, the Chief Financial Officer/Auditor, Mayor's staff, and non-union employees and managers who have contributed significantly to this effort. Employee input through forms and on-site interviews, as well as comments and suggestions received, made a valuable contribution to the study. We greatly appreciate everyone's ability to meet with us and provide information in a timely manner. HRS will remain available

to answer any procedural questions the City may have in the implementation of the study's recommendations. While this is a final report, we will remain available to make any modifications needed to make this a useful tool for the City.

Very truly yours,

Sandy

Aleksandra E. Stapczynski

President



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CITY OF MELROSE, MASSACHUSETTS COMPENSATION AND CLASSIFICATION STUDY FOR NON-UNION

I. Introduction

A. Scope of Services

The City of Melrose, MA retained Human Resources Services, Inc. to conduct a comprehensive compensation and classification study of Non-Union Positions. This study was commissioned to examine the responsibilities, work performed, and market pay rates for each position included in the study. In general, the study involved developing new job descriptions, classifying those positions according to a uniform point analysis standard, surveying the market of comparable municipalities and other organizations as needed to determine representative rates of compensation, and developing and *recommending* a new compensation and classification plan and system for the non-union group of positions.

The objectives of the study were to:

- Develop a job evaluation system that would encompass all non-union positions and ensure that compensation levels were both internally equitable and externally competitive.
- Develop for the City the necessary guidelines for administering compensation on an ongoing basis to ensure that pay levels remain equitable and competitive.

In scope, the study included all non-union positions (approximately 70 in number). Another approximate dozen positions were evaluated for

compensation only for the organizational review and staffing needs.

HRS' approach to the study was comprehensive. The study began by collecting job content information for those positions to be evaluated. Job content evaluation factors and appropriate factor weightings were prepared and analyzed. The evaluation process involved a comparative approach where each position was compared to all others on each evaluation factor, one factor at a time.

A grade structure was developed by tabulating competitive data for the benchmark positions and studying trends in the market. A tentative pay structure and classification listings were presented to the City for their consideration. Employee listings comparing each individual's salary to the proposed structure and associated implementation costs were prepared for Finance.

This report is prepared for the City to document in detail the procedures for position evaluations and gradings and development of the salary structure. It also sets forth the recommendations for the implementation and ongoing administration of the system.

Through the consultant teams evaluation comparing both market data and job ratings point totals, it was determined the appropriate number of salary levels needed to clearly differentiate varying levels of job value. Twenty-three salary levels emerged as a suitable number for the City to develop a new consolidated non-union compensation and classification plan. Positions were assigned to a salary grade level on both the basis of its total point scores, and the external job market.

A position compensation and classification plan is an essential component of a total personnel administration program. The perception that the compensation plan is objective and fair in its assignment of pay to individual positions lends credibility to the organization's entire personnel system. This study and its recommended plan is derived from a systematic, formalized and objective method for developing equitable job groupings and compensation levels for all positions covered. An underlying assumption is that all positions and individuals should receive "equal pay for equal work." However, the initial implementations of the recommended plans are not the final steps in achieving job equity. Rather it establishes a uniform point of beginning from which to regularly review and ensure that decisions regarding position requirements and compensation accurately reflect the organization's current service needs and the performance of employees. Each new position established and adjustments to the plan need to be done in a consistent manner to maintain the plan's integrity and relevance.

According to the Massachusetts Employment Pay Act, (MEPA), employees doing equal work should be paid equally. Our methodology and system addresses the major components required of MEPA. For work to be equal or comparable, it must involve substantially similar skill, effort, and responsibility, and be performed under *similar* working conditions, but are not necessarily identical or alike in all respects. The requisite requirements or skill includes an employee's experience, training, education, and ability to perform the jobs. An employee's skill must be measured in terms of the performance requirements of a job, that is why it is important to always ensure that the job descriptions are up to date and accurate so employees know what is expected of them in their jobs. Effort refers to the amount of physical or mental exertion needed to perform a job. Finally, responsibility encompasses the degree of discretion or accountability involved in performing the essential functions of a job.

For maximum effectiveness, the relationship between consultant and client must be a cooperative effort. While Human Resources Services assumes responsibility for all final recommendations, client input has been actively sought, carefully weighed and incorporated into the report whenever possible and appropriate.

B. Specific Study Process

This project included the following steps:

- *Organizational Meeting* with Mayor, HR Director, and Finance to discuss the goals and objectives of the study; and to orient top executives on the process and methodology that would be used.
- Several *Orientation Meetings* with employees and managers to explain project activities, objectives, methodology. Position Analysis Questionnaires were distributed to employees at these orientation sessions. The meetings also gave everyone an opportunity to meet HRS consultants and to ask questions.
- A thorough *Job Analysis Process* which involved reviewing position duties and responsibilities (essential functions) and requisite requirements of the job, utilizing position analysis questionnaires and on-site interviews with all employees.
- Preparation of updated *Job Descriptions* with review and comment from employees, managers and HR staff. The client had an opportunity to

thoroughly review the draft job descriptions.

- A thorough *Job Evaluation Process*. Position rating and ranking utilizing HRS' rating manual.
- Development of a *Classification Plan*. Position assignment to grades based on a system of objective evaluation.
- Thorough *Market Analysis* using primarily comparable municipal organizations jointly selected by the City of Melrose and HRS.
- Establishment of *Compensation Schedule* using comparative wage data as a general guide.
- Several *meetings in person and through telephone conference* with the *Chief Financial Officer and Human Resources Director* to discuss pay policies and review draft work products (i.e. job descriptions, classification plan, salary schedule, comparative data, ratings, and other related project documents).
- General guidance on *Implementation*.
- Final *Presentations* to the City and employees shall be given upon request of the City. Based on any additional information received, HRS shall make adjustments as appropriate and amended the Final recommendations.

- Final preparation of *Report* to the City of Melrose with explanation of recommendations and methodology.

The following documents have been prepared for the City of Melrose:

- Proposed Position Titles
- Proposed Classification Plan
- Proposed Compensation Plan
- Compensation Comparisons Chart
- Market Data Analysis
- Placement and Costing out of Compensation Plan
- Position Analysis Question (PAQ)
- Updated Job Descriptions for each Position
- Evaluation Materials and Documents
- HRS Position Rating Manual

II. Job Descriptions

A. Preparing the Job Descriptions

One major aspect of this study involved the development of updated job descriptions. Through the job analysis process, HRS discovered that many of the current job descriptions were outdated and there was no consistent format for descriptions. HRS' proposed job descriptions are submitted to the City of Melrose as part of this final report; they are provided in electronic Word format only. They also provide the necessary language to aid in recruiting minority employees, as the City has made diversity and inclusion a major emphasis in all recruitment efforts.

In addition to assisting with the development of job analysis and classifications, good descriptions produce many other important benefits. These job descriptions emphasize the purposes of each position and the types of results which each incumbent is expected to produce. Representative examples of the work performed and minimum qualification requirements are listed. These job descriptions are small but important components of more comprehensive personnel, organizational and administrative systems or plans. They can and should be used not only for recruitment and promotion, but as tools to assist in the administration of the City. They help define initial expectations, provide fundamental building blocks for administering compensation systems, and give additional definition to organizational charts. Because they focus on purposes and results, they can and should be used when developing employee objectives, performance plans and performance appraisals.

The job descriptions presented to the City are up-to-date, clear, and identify the duties of each position, as well as the education, experience, training, knowledge, ability, and skills, and competency levels required.

B. The Significance of Job Descriptions.

Today, job descriptions have become more important than ever. Although employers are not required by law to have written job descriptions, there are many laws that impact the employer-employee relationship and having job descriptions can help the organization comply with those regulations. There are federal laws such as the Fair Labor Standards Act (FLSA) that impact employees. Other laws, such as federal discrimination statutes, prohibit discrimination against various protected classes. Because job descriptions document the duties and qualifications of a job, they can help support why one applicant was qualified and another was not, why one position pays more than another, or why an employee is terminated for poor performance.

Under the ADA, job descriptions, particularly the lists of duties and responsibilities, take on new significance. The purpose of the ADA is to ensure that individuals *with* disabilities be given the same consideration for employment that individuals *without* disabilities are given. Essential functions are the primary or fundamental job duties intrinsic to a position, that is, the duties that are essential to achieving the objectives of the job. Related to the essential functions or duties are the tools and equipment used to perform the essential job functions, the physical demands of the job duties, and the work environment in which the duties are performed.

The new job descriptions include: (1) prerequisites for each position, including the physical needs, knowledge, ability, and skill, education, training and experience; (2) essential job functions; and (3) work environment. All job descriptions should be reviewed and updated periodically to ensure accuracy. Positions can change for many reasons: (1) an incumbent starts assuming more responsibilities in addition to the duties in the job descriptions, (2) staff changes, (3) changes in procedures and

processes, (4) new technology, tools, or machines, (5) external regulations or legislation, (6) reorganizations, (7) new supervisor or manager.

In short, the process of developing accurate and uniform job descriptions forces the employer to analyze each position and to identify the position's necessary qualifications (the "requisite skill, experience, education, and other job-related requirements"), as well as to determine the position's "essential functions."

III. Classifying and Compensating Positions

A. The Classification Plan

It is important to consider the objectives of (1) **Job Analysis** and (2) **Job Evaluation** when reviewing the proposed classification plan. Building the classification plan involved both job analysis and job evaluation.

Of critical importance in the process of reviewing jobs are the inherent job factors and the particular skills or quality of work required of the position. A thorough **Job Analysis** produces, in general, five kinds of basic information to aid in this process:

1. *nature of the work* (e.g., essential functions and purpose/objective of the position)
2. *level of the work* (e.g., degree of complexity and accountability)
3. *job requirements* (e.g., the knowledge, skills, abilities and other special requirements/characteristics needed to perform the job)
4. *job qualifications* (e.g., minimum education, training and experience needed to qualify)
5. *working conditions* (e.g., the psychological, emotional and physical demands placed on employees by the work environment).

Information about each position studied was obtained through detailed position analysis questionnaires (PAQ) and employee interviews. Employees were asked to describe their positions in detail on the PAQ form. Examples of information requested from the PAQ included: job summary, essential functions, education, training and certifications, knowledge, ability, skill, experience, physical requirements, supervisory responsibilities, and technologies and equipment used. Finally, interviews were conducted to clarify and augment the employees' questionnaire responses.

Job Evaluation is a process that establishes the relative value of jobs within an organization. There may be several reasons for carrying out this process; the main ones are: (1) to establish the correct rank order or groupings of jobs, (2) to establish the relative distance between jobs within the ranking, (3) to provide an objective measurement of job size for comparison with other jobs and enable salary comparisons to be made.

Job evaluation is the process whereby positions are analyzed, measured and compared against a common set of criteria in a systematic and objective manner. Job evaluation does not produce a rate of pay. Rather, it produces a ranking of jobs in terms of "job content" around which a salary structure can be established. Similarly, the evaluation process does not measure an individual's performance. The evaluation looks at the job, not the job holder; it assumes that the job is being performed to a fully acceptable standard and that all the identified requirements of a job are being met.

Using a point-factor evaluation system, positions were rated by the consultants and then ranked and assigned a grade. Fourteen rating factors were used to rate all of the positions. These factors, detailed in HRS' Municipal Position Classification and Rating Manual, measured the requirements of each position in various areas. The following are a listing of each rating factor. The manual describes each factor in great detail and by degree.

1. Physical Environment
2. Basic Knowledge, Training and Education
3. Problem Solving Skills and Effort
4. Physical Skills and Effort
5. Experience
6. Interactions with Others/Customer Service
7. Confidentiality
8. Occupational Risks
9. Complexity
10. Supervision Received
11. Supervision Given
12. Supervision Scope
13. Judgment and Initiative
14. Accountability

As mentioned previously, job rating is not synonymous with performance evaluation. The position, not the incumbent, is evaluated, assigned points and a grade derived. One of the best information sources for rating a position is a current and relevant job description and/or a recently completed PAQ which is why these should always be completed early in the process. The process described in HRS' Municipal Position Classification and Rating Manual increases the uniformity and objectivity in the application of judgments about positions and the groupings of positions. This process can be used to update the proposed classification plan, to determine how to place new positions on the plan, and to re-grade a current position with adjusted duties to a different grade. Samples of the *Position Rating Summary Sheet* are included in the Manual along with the *Points Assigned to Factor Degrees*. A custom *Grade Determination Scale* was developed for the City of Melrose.

B. Market Survey and Developing the Compensation Plan

Human Resources Services, Inc. conducted a thorough salary survey and market analysis to determine the market competitiveness for positions included in this study. To measure the pay rates among competitors for these positions, HRS distributed custom survey documents to comparable municipal organizations jointly identified by the City and HRS. For this study, HRS received survey responses from the following Massachusetts municipalities for compensation, benefits and other related information:

1. Arlington
2. Newburyport
3. North Andover
4. Peabody
5. Reading
6. Salem

7. Saugus
8. Stoneham
9. Wakefield
10. Winchester; and
11. ERI and MMHR Data

The City of Melrose is a well-managed forward-thinking community with a history of a creative and complex organization. The consultant team met with city management/finance and human resources staff to review a draft pay/class plan and to review the market data collected and discuss its meaning. An initial analysis of the market data involved reviewing the average, median, range, 75th percentile and 90th percentile. A comparison was then made to current Melrose salaries for this non-union group of positions.

All of the comparative data is current information and presented on the following pages. Most of the data was collected during the fall of 2021. HRS collected minimum and maximum salary ranges from the comparable organizations. Certain data may have been pro-rated to hourly for comparison purposes only. In each cell, the top number indicates the minimum salary range for each position and the bottom number indicates the maximum salary range for each position. Virtually every organization had some type of a pay/class structure.

For each position analyzed, data points were collected from the labor market. The data points indicate the amount of salary information for each position surveyed. In some instances: (1) the organization did not have a comparable position; or (2) the consultants determined that the position was not comparable to the position in Melrose. HRS used professional discretionary judgment when comparing positions to the comparable data. If there was less than two data points of salary information for a position, HRS placed more emphasis on the position rating when placing the position on the compensation/classification plan. While this market analysis and information provides the City of Melrose with benchmark salary data to set the parameters for compensation decisions, the client must also consider the “uniqueness” of certain positions in the organization as well as the organization’s compensation policies. The compensation and classification plans are attached to this report for your review.

C. Description of Compensation and Classification Plan

Setting the rates of pay for jobs on the position hierarchy results in what is called a “pay structure”. When reviewing or developing pay rates, a number of major policy decisions are typically made. For example: How should the City’s pay rates compare to the market? How competitive does the City want to be? What type of structure is best for the City; steps, ranges, quartiles, etc. For what does the City want to pay? (i.e. job content, seniority, performance, cost of living, etc.) How does the organization currently pay its employees? The resulting compensation plan must reflect the City’s pay policies, the market place, internal job values, and the financial desire of the City to pay at a given level to attract needed talent. It should also ensure internal and external fairness. “Internal” being comparable worth within

the organization of the classification plan; and “external” being the market to ensure a competitive pay structure.

The proposed compensation and classification plan is presented on the following pages. Pay ranges were set for groups of positions which the consultants determined should be paid equally. There are twenty-three grades for this group and ten steps for each grade. There is 2 percent between each step. The City’s current pay structure for the non-union positions includes a variety of pay scales. These were consolidated into one uniform compensation plan, thus making it less complex. This will allow for more equity, especially when hiring new employees. Also the entire pay structure in its entirety has been updated to reflect the market. Comparative data was considered to set the grade parameters, while the classification process controlled the internal assignment of positions to progressive compensation levels. Currently, the City operates within a context of “pay steps” for this group of non-union positions. HRS recommends continuing the policy on pay steps for easier maintenance and consistency of the plan. In general the pay ranges were developed utilizing the salary market data and targeting approximately the 75th of market. It was necessary to target the 75th of market in order to remain competitive as compared to other advanced municipalities in Massachusetts. HRS provided the City with additional benchmark salary data too from its ERI (Economic Research Institute) database of salaries and wages.

The proposed compensation plan is based on current compensation data. This is a base salary plan and does not include compensation for stipends, cost-of-living, benefits, or other compensation. It is up to the City to determine its ability to pay with regards to implementation of this proposed pay plan.

Those employees falling below the grade range should be brought into the entry level of the grade ranges as soon as possible. The salary schedule should be updated with a cost-of-living for each succeeding fiscal year. The consultants costed the plans in a variety of ways for the finance department, but it is up to the City to determine the policy for implementation. HRS will of course remain available to provide the necessary guidance.

IV. Implementation and Other Recommendations

The following sections are intended to assist and guide the City of Melrose in implementing the proposed compensation and classification plan for non-union positions. Successful implementation will require a concerted effort by management, employees and city officials.

1. Compensation Structure and Maintenance

The recommended pay structure contained in this report is designed to provide appropriate compensation through the next three fiscal years. An initial review of the structure would be appropriate by fiscal year 2026, and then subsequent reviews annually. Review of the structures should take into consideration both internal and external conditions.

The distribution of individual salaries, both by salary level and position within salary level, should be regularly examined to determine whether there is sufficient opportunity for continued salary growth.

Since organizational arrangements and position duties and responsibilities may change from time to time, it will be necessary periodically to reevaluate existing positions and evaluate new positions.

It is most important that Melrose regularly audit and review their compensation system to ensure its validity. We believe that Melrose did not do this for some time, and therefore their plans were outdated.

2. Initial Placements for Current Employees

The placement of two or more positions on a certain grade represents a judgment that those positions should be compensated comparably within the grade range provided. The range is like a scale providing the City with

the opportunity to make distinctions between employees (not positions) based upon established criteria, applied consistently. These criteria might include job performance, special abilities, experience, longevity, gender-equity, and/or any other factors determined by the City.

For initial placement of incumbents within the plan, the City should assign employees to be placed at the step closest to but just above their current wage/salary in order to not reduce the pay of any current employee. The City should also realize that this minimum approach may not recognize certain distinguishing factors among employees.

3. Salaries Below Pay Range

If the salary of an employee is below the minimum of the grade range at the time of implementation, every effort should be made to bring it into the range.

4. Salaries Above Pay Range

To maintain morale and a sense of fairness, HRS recommends the City not reduce the compensation level of any current employee. If an employee's current salary falls above the upper limit of the recommended grade range, then the City should maintain the employee's salary above the maximum for the grade until the employee retires or separates from the City. This is called "red-circling" a position. New employees can be hired at the appropriate lower pay rate. HRS recommends a single administrative policy be adopted and subsequently applied in all cases.

5. Consolidate Classification Plan

HRS recommends that the City develop one consolidate classification plan as we have proposed in this report for the non-union positions, the multiple

salary schedules approach based on hire date should be eliminated. One consolidated plan will ensure better internal equity for positions; so the rating point values of grades are the same and consistently applied; and so the pay equity of positions match the requirements of MEPA; and finally the entry pay is similar for those falling on a similar grade. (Currently the City has multiple plans for the non-union.)

6. Vacancies

When a vacancy develops, it is a good time to automatically review the position. This may involve a job analysis and updating the job description and reviewing the market for the particular position. Positions should also be evaluated according to the appropriate rating factors. Point totals should be calculated for each position by adding the point scores from the degree levels achieved under each factor. On the basis of total points, position generally should be assigned to the appropriate salary levels, according to the established salary level point ranges; and also taking into consideration the external market.

7. Salary Plan

HRS has proposed the following:

- Creation of a salary schedule with each grade having a salary range consisting of a minimum and maximum; and series of steps.
- Positioning of the salary structure at the 75th of market.
- Establishment of a competitive salary schedule, particularly for those fields of study that are considered to be in high demand and that may command high salaries in the market (i.e. Finance, Health, Technology, Facilities, etc.).

8. Update and Maintain the Classification and Compensation Plan

The human resource department should maintain and update the compensation and classification plan. This would include the following tasks:

- Conduct regular position reviews to assure positions have current functional job descriptions that are based on job content.
- Conduct job analysis of new positions to assure these positions are properly assigned to a grade.
- Review positions to ensure internal equity in relationship to other City of Melrose classifications.
- Conduct periodic salary surveys to ensure market competitiveness.
- Review MEPA requirements.

9. FLSA Status

HRS also determined the FLSA Status (exempt/non-exempt status) of the positions included in the study. HRS recommends that City of Melrose regularly evaluate the FLSA status with its labor counsel, as case law may cause changes. HRS utilizes the ERI Occupational Assessor to determine FLSA status of positions. The results of the FLSA audit information was provided to Human Resources.

10. Cost-of-Living Increases vs. Step/Range Movement

Here, it is important to distinguish between (1) a cost-of-living increase and (2) a step increase. A cost-of-living increase is intended to recognize and respond to a general rise in the cost of goods and services experienced by the general population. Each year, the City should determine an appropriate cost-of-living adjustment and apply that increase across the entire compensation schedule. A range movement (step increase) addresses the issue of how employees move along the levels within a grade from minimum to maximum, based on performance, longevity, special skill, certification, etc. The compensation plan should consist of two components: (1) the range adjustment factor (RAF); and (2) the movement-increase factor (MIF), which is based on merit step increase. The RAF is the movement of the total salary range, while the MIF is the movement *through* the salary range steps. A salary-range increase consists of the sum of these two components, plus their interaction or compounding result; thus a salary/wage adjustment. It is very important to regularly update the entire compensation structure with a COLA, or it will quickly become outdated, and the City will have difficulty recruiting talent.

11. Performance Appraisal and Merit-Increase.

It was not within the scope of services for HRS to develop a performance appraisal “tool” for the City of Melrose, MA. HRS has a few suggestions, should the town decide to implement a new updated performance system. A *Management by Objectives System* would be an appropriate methodology for employees engaged in high-level managerial, supervisory or professional positions. A *Uniform Performance Criteria System* is the most commonly used methodology and is best suited to positions where employees

consistently perform the same type of work on a fairly regular basis. This format works well for administrative, clerical, laborers, and other non-exempt positions. The City should consider updating its performance appraisal systems and provided the necessary training for employees, supervisory personnel, and department heads.

12. Determination of Individual Wages/Salaries.

What follows are some general implementation and maintenance guidelines.

a) New Employees

Applicants with qualifying experience are normally hired close to the normal starting rate of the new range. Applicants with outstanding qualifications; education, training and experience may be hired at the wage/salary within the range for the position, but normally no higher than the midpoint of the range. In rare cases, for positions that are very difficult to recruit, it may be necessary to hire beyond the mid-point of the pay range.

b) Transfers

Employees transferred to a position at the same level as their present position will normally receive the same salary paid at the time of the transfer.

c) Transfer to a Lower Salary Grade

Employees transferred by necessity (such as reduction in staff), rather than for inadequate performance, should receive their present salary, although this may exceed the maximum for the lower classification.

d) Promotional Increases

If employees are promoted on a “trial” or “acting” basis, the promotional increase may be deferred until they have demonstrated their ability to handle the duties of the higher classification.

In closing, this HRS methodology will be of assistance in furnishing improved tools and guidance to management and human resources. Ensuring that job descriptions, salary and classification plans are regularly reviewed and have valid methodologies will ultimately improve the management of compensation for all positions. The HRS System will provide a framework within which most salary matters can be handled going forward. While both job evaluation and salary surveys attempt to achieve consistency in the pay structure, they use different criteria to evaluate consistency (i.e. internal vs. external comparison). This methodology works at striking a balance between internal and external pay equity.



ATTACHMENTS

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Administrative Accounting Assistant (Police) - PT	19.51 21.50	4 5	24.49 31.24	19.00 35.44	25.11 31.20	27.66 35.44
Animal Control Officer - PT	24.47 26.96	4 7	21.68 30.55	14.00 38.84	21.92 30.00	24.43 35.86
Assistant Auditor	36.95 47.49	6 8	31.90 41.62	23.91 60.91	31.05 39.23	34.82 45.36
Assistant City Clerk	31.68 40.71	7 10	29.12 35.88	17.21 55.88	28.46 34.29	33.14 35.33
Assistant City Solicitor	46.21 59.39	3 4	38.89 51.61	17.21 78.53	45.11 52.34	49.73 72.78
Assistant Director - DPW Administration and Finance	52.02 66.84	5 8	38.72 51.18	22.60 62.32	42.66 54.75	45.10 56.50
Assistant Director of IT	36.95 47.49	2 2	41.97 54.80	38.29 59.06	41.97 54.80	43.80 56.93
Assistant Director of Planning and Community Development	31.03 34.19	2 4	43.62 55.51	42.66 58.87	43.62 55.03	44.10 56.11
Assistant Library Director/Head of Technical Services	36.95 47.49	6 7	33.73 43.25	20.34 60.91	34.37 39.93	40.00 49.73
Assistant Parks Superintendent (Benchmark)	not on plan	2 2	30.33 40.58	27.05 45.56	30.33 40.58	31.96 43.07
Assistant to the Director of Inspectional Services	25.93 33.32	4 5	28.67 34.27	19.72 45.08	30.54 36.59	31.95 38.60
Assistant Treasurer	36.95 47.49	9 10	30.82 39.39	17.21 55.88	31.30 38.35	32.08 40.59
Building Systems Supervisor (HVAC Supervisor) - DPW	34.47 37.98	5 5	31.37 42.65	25.84 50.48	32.67 43.11	34.58 48.23
Cemetery Administrator	31.03 34.19	4 5	29.58 39.24	24.75 48.02	29.99 38.05	33.10 45.02
Chief Assessor	48.05 61.74	7 10	41.46 56.78	27.99 74.16	41.67 52.14	45.16 66.12
Chief Financial Officer and City Auditor	68.93 87.69	5 8	50.95 66.72	32.37 78.53	54.35 67.03	55.46 74.13
Chief of Police	contract 63.58	5 8	61.52 81.44	50.53 94.33	59.78 82.82	68.88 88.33
City Clerk	39.52 50.78	3 8	39.92 49.17	37.28 66.39	37.88 47.65	41.24 50.97
City Engineer	45.76 58.80	6 9	43.81 55.47	30.31 68.29	45.21 55.00	48.03 64.37

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
City Planner	40.21 44.30	3 4	36.17 49.01	33.15 60.91	34.44 46.91	37.68 52.95
City Solicitor - Labor Counsel	65.03 82.73	4 5	55.14 71.24	29.33 90.19	57.62 73.48	63.84 86.39
Clerk of Committees	30.80 39.58	1 2	35.64 47.87	35.64 49.80	35.64 47.87	35.64 48.83
Council on Aging Coordinator	19.51 21.50	3 4	23.90 25.78	23.15 29.94	24.04 25.95	24.28 28.01
Council on Aging Director	48.05 61.74	8 8	35.88 45.75	22.78 60.91	34.85 42.58	39.85 53.70
Communication and Community Outreach Coordinator	31.63 40.71	3 6	30.70 39.77	21.29 48.02	32.93 41.46	35.41 46.14
Deputy City Engineer	39.52 50.78	3 4	42.03 56.95	37.26 69.69	37.53 54.11	44.42 59.33
Director of Inspectional Services/Building Commissioner	39.52 50.78	7 9	45.12 56.68	41.00 78.53	44.59 53.04	46.08 65.32
Director of Community Development and Planning	48.05 61.74	7 10	45.75 58.72	29.33 86.39	47.26 54.77	49.15 64.92
Chief Information Officer (city and schools) / IT Director	57.87 73.63	5 8	48.79 64.71	44.59 85.11	49.05 65.15	49.76 67.36
Director of Public Works	68.93 87.69	7 10	54.25 70.60	30.31 86.39	54.58 72.10	61.54 79.20
Director of Strategic Initiatives and Communications (Mayor's Office)	48.05 61.74	3 3	46.34 64.71	41.00 82.03	45.64 59.06	49.00 70.54
Energy Efficiency Manager <i>Benchmark</i>	28.47 31.37	2 3	32.10 41.99	29.42 45.01	32.10 41.71	33.44 43.36
Executive Assistant to City Solicitor	28.26 36.31	2 2	31.15 41.39	30.14 41.61	31.15 41.39	31.65 41.50
Executive Director - Melrose Contributory Retirement	44.40 48.91	2 3	40.71 57.97	32.37 70.88	40.71 57.30	44.88 64.09
Executive Director Melrose Memorial Hall	33.88 43.54	3 3	32.94 44.11	31.31 50.48	32.92 44.27	33.75 47.38
Executive Office Manager - Police	26.12 28.79	2 8	30.93 36.10	30.48 41.29	30.93 36.76	31.15 38.72
Event Operations Assistant - Memorial Hall	19.51 21.50	1 1	20.65 28.98	20.65 28.98	20.65 28.98	20.65 28.98

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Facilities Manager - City and Schools	45.76 58.80	4 7	51.19 63.46	44.59 86.39	50.20 59.92	55.88 68.50
Finance Manager (Auditing)	28.26 36.31	2 3	31.08 40.28	30.32 46.51	31.08 39.80	31.46 43.15
Finance Administrator - Fire Dept./Public Safety	25.67 32.99	3 3	28.31 36.27	27.30 37.93	28.74 35.44	28.81 36.68
Financial Systems Analyst/Project Manager (Auditor/IT Depts.)	39.52 50.78	4 4	43.88 57.46	31.37 68.47	46.54 57.85	50.58 62.49
Fire Chief	contract 66.27	5 8	59.39 73.94	50.53 86.39	59.78 73.87	64.96 77.58
Health Director (Melrose is regional)	61.35 78.05	6 7	36.18 47.13	23.91 59.06	36.84 46.16	39.97 53.78
Human Resources Assistant	28.47 31.37	1 2	26.44 35.63	26.44 36.27	26.44 35.63	26.44 35.95
Human Resources Director	48.05 61.74	7 10	41.82 54.86	26.71 70.88	41.67 52.30	46.82 63.17
Human Resources Benefits Coordinator	36.95 47.49	7 10	29.58 37.29	17.21 50.48	29.31 37.16	32.69 39.37
Library Director	36.59 47.02	7 10	43.20 54.50	25.35 78.53	44.59 51.81	48.06 61.83
Local Building Inspector (Certified)	40.21 44.30	4 7	33.38 40.21	31.31 50.48	33.81 40.39	34.15 42.71
Milano Center Manager (COA)	31.03 34.19	1 1	41.25 54.84	41.25 54.84	41.25 54.84	41.25 54.84
Operations Manager - DPW	39.52 50.78	4 6	42.75 51.68	39.02 58.09	43.08 51.66	44.09 56.60
Program Coordinator - MA in MotionZBA Clerk	28.47 31.37	1 1	25.38 34.09	25.38 34.09	25.38 34.09	25.38 34.09
Planning Coordinator & ZBA Clerk	24.47 26.96	3 3	23.12 29.85	18.65 34.15	22.25 30.25	25.36 32.20
Plumbing and Gas Inspector	28.47 31.37	5 7	28.83 37.37	19.95 48.02	28.46 36.23	32.93 43.49
Public Health Specialist	34.47 37.98	2 2	35.90 47.88	33.61 52.27	35.90 47.88	37.05 50.07
Program Coordinator - Tobacco/Alcohol	26.12 28.78	1 1	34.25 46.91	34.25 46.91	34.25 46.91	34.25 46.91
Project Engineer	28.26 36.31	4 6	34.67 43.86	31.68 53.61	35.35 43.05	36.27 46.60
Recreation Coordinator	26.12 28.78	7 8	25.39 31.81	17.21 48.02	24.52 28.60	28.84 33.94

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Recreation Director	45.76 58.80	7 9	38.00 48.96	26.71 70.88	37.77 44.90	41.29 53.07
Sealer of Weights and Measures	31.92 35.17	2 3	31.85 42.74	30.77 48.02	31.85 40.39	32.39 44.20
Senior Planner	40.21 44.30	5 7	33.29 43.64	28.01 51.27	34.43 45.01	34.78 50.19
Superintendent of Mount Hood - <i>Limited Data</i>	45.76 58.80	2 2	34.74 47.56	25.66 60.47	34.74 47.56	39.27 54.01
Superintendent of Parks	not on plan 29.12	4 5	35.20 41.90	26.71 49.77	36.21 39.80	39.53 45.02
Sustainability Manager	28.26 36.31	2 2	36.09 51.34	34.64 55.88	36.09 51.34	36.81 53.61
Systems Analyst IT (city/schools) - networks/databases	30.80 39.58	3 5	40.97 50.99	34.43 55.19	42.66 51.27	44.24 55.00
Treasurer/Collector	48.05 61.74	7 9	43.83 58.05	23.91 78.53	45.27 56.17	48.84 66.39
Veteran's Administrative Assistant/PT	19.51 21.50	1 2	31.74 36.34	31.74 42.56	31.74 36.34	31.74 39.45
Veterans Services Director (Regional Position)	39.81 43.87	6 7	28.35 37.02	19.95 47.14	28.23 36.23	31.23 42.93
Water-Sewer Administrator (Billing)	30.80 39.58	3 5	24.94 35.04	21.29 40.39	23.75 36.59	26.77 39.37
Wiring Inspector	31.92 35.17	6 8	30.87 40.27	19.95 48.02	30.70 41.93	34.32 46.41

POSITION TITLE	Melrose Current		Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
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ADDITIONAL BENCHMARK DATA

Assistant Health Director		3	32.23	29.58	33.51	33.56
		3	42.27	43.49	42.16	42.82
Director - E-911		1	32.87	32.87	32.87	32.87
		1	45.59	45.59	45.59	45.59
Dispatch Center Manager		4	26.63	22.27	26.72	28.57
		5	33.24	39.85	30.93	34.97
Dispatcher/Communicator		6	22.56	20.55	21.68	22.78
		6	27.80	36.23	26.48	28.00
Diversity, Equity and Inclusion Director/Coordinator		3	42.41	36.00	37.28	45.61
		3	58.97	82.11	48.22	65.17
Emergency Management Director		1	40.13	40.13	40.13	40.13
		1	45.34	45.34	45.34	45.34
Health and Human Services Director		3	51.93	49.62	51.82	53.08
		5	64.00	78.53	65.32	70.92
Help Desk Technician		4	30.23	28.05	29.63	31.51
		5	37.64	45.02	35.82	39.85
Mental Health Clinician		3	25.60	21.46	25.46	27.67
		3	36.04	43.61	32.94	38.27
Parks Grounds Laborer (Pine Banks)		4	20.94	17.46	20.31	23.10
		4	24.80	29.90	23.42	25.39
Park Ranger		1	24.03	24.03	24.03	24.03
		1	29.96	29.96	29.96	29.96
Purchasing Director/Coordinator		5	34.52	23.91	34.58	37.28
		6	44.89	55.19	48.61	50.11
Social Worker		3	30.88	22.73	33.61	34.96
		3	43.37	53.61	43.49	48.55

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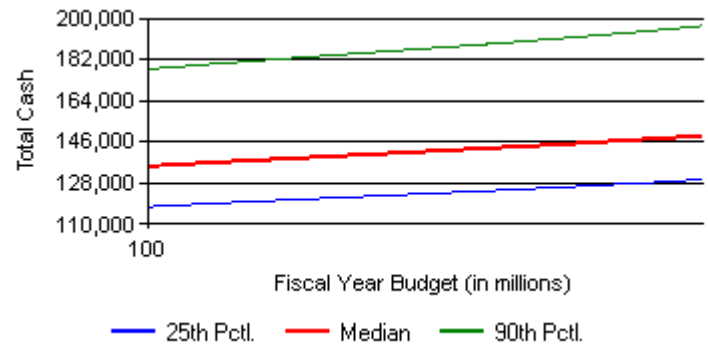
Individual Job Report

Police Chief

Specifications

Prepared For: City of Melrose, MA
Area: Massachusetts - Commonwealth Average
Industry: Government - City Support Services
Industry Codes: eSIC: 9104, NAICS: 921100, usSEC: 9721
Organization Size: 400,000,000
Education Adjustment:
Skill Adjustment:
Certification Adjustment:
Annualized Salary Trend: 2.6% (Adjustment: 0.21%)
Planning Date: 2/6/2022
Database as of: 1/1/2022
 eDot: N/A
 SOC: N/A
 Printout Date: 2/6/2022
 (Items in bold affect salary estimates)

Annual Total Cash Graph



Estimated Survey Median Annual Total Cash

All Incumbent Median: \$148,695

Fiscal Year Budget	25th Percentile	45th Percentile	Median	75th Percentile	90th Percentile
400,000,000	129,379	145,333	148,695	173,738	196,680
200,000,000	123,194	138,462	141,757	165,331	186,740
100,000,000	117,513	132,114	135,290	157,868	177,787

The Police Chief in Melrose is a contract position; therefore HRS has not placed this position on the compensation and classification plan, as the contract would prevail. Instead, HRS has provided pay range data for police chiefs in the custom market survey. However, we determined it was necessary to look at statewide composite actual rates data from municipal communities in order to discern better what police chiefs are making in 2022. The range is \$157,868 to \$173,738 at the 75th percentile. The all incumbent average is \$148,695. This is hybrid data through ERI.

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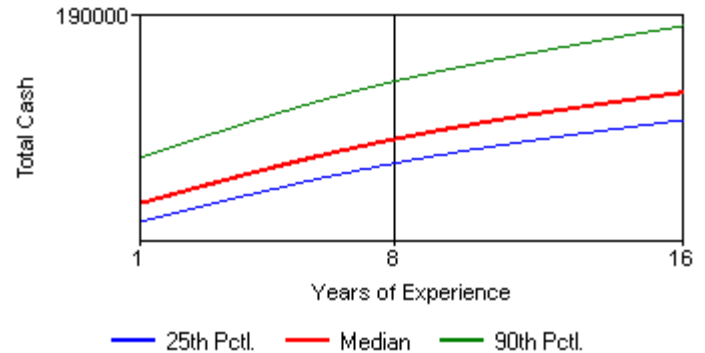
Individual Job Report

Fire Chief

Specifications

Prepared For: City of Melrose, MA
 Area: Massachusetts - Commonwealth Average
 Industry: Government - City Support Services
 Industry Codes: eSIC: 0000, NAICS: 000000, usSEC: 0000
 Organization Size: (Data reported by years of experience)
 Education Adjustment:
 Skill Adjustment:
 Certification Adjustment:
 Annualized Salary Trend: 2.6% (Adjustment: 0.21%)
 Planning Date: 2/6/2022
 Database as of: 1/1/2022
 eDot: N/A
 SOC: N/A
 Printout Date: 2/6/2022
 (Items in bold affect salary estimates)

Annual Total Cash Graph



Estimated Survey Median Annual Total Cash

All Incumbent Median: \$129,224

Years of Experience	25th Percentile	45th Percentile	Median	75th Percentile	90th Percentile
15	136,233	147,128	149,591	166,333	181,340
10	123,644	133,661	135,968	151,767	164,981
5	106,310	115,034	117,078	130,950	142,987

The Fire Chief in Melrose is a contract position; therefore HRS has not placed this position on the compensation and classification plan, as the contract would prevail. Instead, HRS has provided pay range data for fire chiefs in the custom market survey. However, we determined it was necessary to look at statewide composite actual rates data from municipal communities in order to discern better what fire chiefs are making in 2022. The range is \$130,950 to \$166,333 at the 75th percentile. The all incumbent average is \$129,224. This hybrid data through ERI.

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Clerk of Committees	City Council	61,151.00		600.00			61,751.00	64,461.25	3,310.25	5.4%	30.80	39.58	11	34.75	4
							-	-	-						
Communication and Community Outreach Coordinator	Mayor	65,703.00		650.00			66,353.00	70,953.75	5,250.75	8.0%	34.22	43.97	12	38.25	4
Director of Strategic Initiatives and Communications	Mayor	96,896.00		650.00			97,546.00	101,802.40	4,906.40	5.1%	48.41	53.33	19	54.88	6
Director of Economic Recovery and Business Development	Mayor	92,230.60		650.00			92,880.60	93,343.60	1,113.00	1.2%	48.05	61.74	15	44.68	5
							-	-	-						
CFO/City Auditor	Auditor	157,172.00	1,175.00	600.00	3,000.00		161,947.00	159,956.65	2,784.65	1.8%	68.93	87.69	23	75.07	8
Assistant City Auditor	Auditor	95,350.00	775.00	600.00			96,725.00	97,925.45	2,575.45	2.7%	36.95	47.49	18	52.79	6
Finance Manager	Auditor	71,481.00	775.00	600.00			72,856.00	72,604.70	1,123.70	1.6%	28.26	36.31	11	34.75	4
							-	-	-						
Chief Assessor	Assessor	93,204.00	775.00	600.00	4,347.00		98,926.00	101,802.40	8,598.40	9.2%	48.41	53.33	19	54.88	6
							-	-	-						
Treasurer/Collector	Treasurer	114,308.00		600.00	1,000.00		115,908.00	114,639.00	331.00	0.3%	48.05	61.74	19	54.88	6
Assistant Treasurer	Treasurer	77,590.00		600.00			78,190.00	77,590.00	-	0.0%	36.95	47.49	13	40.80	4
							-	-	-						
Exec. Assistant to City Solicitor	Legal	68,707.00	975.00	600.00	6,500.00	3,000.00	79,782.00	70,100.45	1,393.45	2.0%	28.26	36.31	10	31.62	3
City Solicitor - Labor Counsel	Legal	134,354.00		600.00			134,954.00	139,254.85	4,900.85	3.6%	65.03	82.73	23	75.07	8
Assistant City Solicitor	Legal	110,158.00	775.00	600.00			111,533.00	111,225.80	1,067.80	1.0%	46.21	59.38	20	57.63	6
							-	-	-						
Human Resources and Labor Relations Director	HR	107,383.00	975.00	600.00			108,958.00	116,846.45	9,463.45	8.8%	48.05	61.74	21	62.99	7
Human Resources and Benefits Coordinator	HR	74,818.00		600.00			75,418.00	75,684.00	866.00	1.2%	36.95	47.49	13	40.80	4
Human Resources Assistant	HR	54,374.00		600.00			54,974.00	55,265.00	891.00	1.6%	28.47	31.37	9	27.54	3
							-	-	-						
Director of IT City & Schools	IT	144,943.00	775.00	600.00			146,318.00	144,943.00	-	0.0%	57.87	73.63	21	62.99	7
IT Systems Analyst	IT	74,890.00	775.00	600.00			76,265.00	76,459.00	1,569.00	2.1%	30.80	39.58	13	40.80	4
Assistant IT Director	IT	93,480.00	775.00	600.00			94,855.00	94,493.70	1,013.70	1.1%	36.95	47.49	16	48.96	5
Financial Systems Analyst/Project Manager	IT	84,884.00	620.00	600.00			86,104.00	86,517.20	1,633.20	1.9%	39.52	50.78	17	50.75	6
Project/System Administrator	IT	69,101.00		600.00			69,701.00	81,935.35	12,834.35	18.6%	34.22	43.97	13	40.80	4
							-	-	-						
City Clerk	City Clerk	90,807.00	775.00	600.00	1,500.00	4,000.00	97,682.00	90,820.80	13.80	0.0%	39.52	50.78	16	48.96	5
Assistant City Clerk	City Clerk	70,158.00		600.00			70,758.00	70,158.00	-	0.0%	31.68	40.71	11	34.75	4
							-	-	-						
Senior Planner	Planning	78,348.00	775.00	600.00			79,723.00	80,321.50	1,973.50	2.5%	40.21	44.30	13	40.80	4
Director of Community Development and Planning	Planning	131,537.00	1,530.00	600.00			133,667.00	131,537.00	-	0.0%	48.05	61.74	19	54.88	6
Sustainability Manager	Planning	72,911.00	975.00	600.00			74,486.00	75,684.00	2,773.00	3.8%	28.26	36.31	13	40.80	4
							-	-	-						
Admin. Accounting Assistant	Police	19,561.00					19,561.00	19,949.00	388.00	2.0%	19.51	21.50	8	20.91	2
Executive Office Manager Police	Police	55,541.00	775.00	600.00			56,916.00	64,810.20	9,269.20	16.7%	26.12	28.79	10	31.62	3

Attachment: MF Attachments Sent 11.3 (ORDER-2023-30 : An Appropriation from Contract Stabilization

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Chief	Police	145,988.00			3,000.00			145,988.00	-	0.0%					
							-		-						
Chief	Fire	142,803.00	2,500.00	600.00			145,903.00	153,888.00	11,085.00	7.8%					
Finance Administrator - Fire Dept	Fire	50,816.00		600.00			51,416.00	57,548.40	6,732.40	13.2%	26.12	28.78	10	31.62	3
Emergency Management Director	Emergency Management	28,620.00					28,620.00	36,490.50	7,870.50	27.5%			12	38.25	4
							-		-						
Assistant to the Director of Inspectional Services	Inspectional Services	61,457.00		600.00			62,057.00	61,457.00	-	0.0%	25.93	33.32	10	31.62	3
Director of Inspectional Services/Building Commissioner	Inspectional Services	105,190.00		600.00			105,790.00	105,190.00	-	0.0%	39.52	50.78	19	54.88	6
Sealer of Weights & Measures/Wire Inspector	Inspectional Services	49,629.00		410.00			50,039.00	56,763.00	7,134.00	14.4%	31.92	35.17	12	38.25	4
Plumbing and Gas Inspector	Inspectional Services	45,058.00		410.00			45,468.00	48,654.00	3,596.00	8.0%	28.47	31.37	12	38.25	4
Local Building Inspector	Inspectional Services	64,452.00		600.00			65,052.00	65,206.96	754.96	1.2%	40.21	44.30	12	38.25	4
							-		-						
Project Engineer	DPW-Admin	65,269.00		600.00			65,869.00	81,090.00	15,821.00	24.2%	28.26	36.31	12	38.25	4
Operations Manager	DPW-Admin	109,201.20	975.00	600.00			110,776.20	111,914.80	2,713.60	2.5%	51.51	66.19	18	52.79	6
City Engineer	DPW-Admin	112,853.00	-	600.00	1,000.00		114,453.00	116,345.60	3,492.60	3.1%	45.76	58.80	19	54.88	6
DPW Director	DPW-Admin	143,014.00	775.00	600.00	1,000.00		145,389.00	142,037.35	(976.65)	-0.7%	68.93	87.69	23	75.07	8
Building Systems Supervisor (HVAC)	DPW-Admin	83,775.00	775.00	600.00			85,150.00	86,496.00	2,721.00	3.2%	34.47	37.98	13	40.80	4
Facilities Manager (City & School)	DPW-Admin	111,794.00		600.00	1,000.00		113,394.00	111,914.80	120.80	0.1%	45.76	58.80	18	52.79	6
Assistant Director DPW Administration and Finance	DPW-Admin	119,936.00		600.00			120,536.00	123,677.60	3,741.60	3.1%	52.02	66.84	19	54.88	6
Deputy City Engineer	DPW-Admin	100,831.00	-	600.00			101,431.00	107,590.00	6,759.00	6.7%	39.52	50.78	17	50.75	6
Cemetery Administrator	DPW-Admin	48,078.00	554.00	429.00			49,061.00	50,681.25	2,603.25	5.4%	31.03	34.19	12	38.25	4
							-		-						
Health Director (regional)*	Health	116,936.00		600.00			117,536.00	150,000.00	33,064.00	28.3%	61.35	78.05	19*	54.88	6
Public Health Specialist	Health	67,615.00		600.00			68,215.00	67,615.00	-	0.0%	34.47	37.98	11	34.75	4
Animal Control Officer	Health	25,686.00		-			25,686.00	25,686.00	-	0.0%	24.47	26.96	9	27.54	3
Program Coordinator - Tobacco/Alcohol	Health	65,538.21	775.00	600.00			66,913.21	65,741.20	202.99	0.3%	26.12	28.78	9	27.54	3
Prevention and Wellness Program Coordinator	Health	56,191.71	666.50	516.00			57,374.21	52,326.90	(3,864.81)	-6.9%	34.47	37.98	9	27.54	3
							-		-						
Milano Center Manager (COA)	COA	58,287.00		600.00			58,887.00	58,695.00	408.00	0.7%	31.03	34.19	10	31.62	3
Council on Aging Director	COA	90,921.00		600.00			91,521.00	97,925.45	7,004.45	7.7%	48.41	53.33	18	52.79	6
							-		-						
Veterans Service Director (Regional)	Veterans	78,448.00		600.00			79,048.00	79,468.20	1,020.20	1.3%	39.81	43.87	14	42.84	5

Attachment: MF Attachments Sent 11.3 (ORDER-2023-30 : An Appropriation from Contract Stabilization

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Administrative Assistant PT	Veterans	19,546.00					19,546.00	19,948.00	402.00	2.1%	19.51	21.50	8	20.91	2
							-		-						
Library Director	Library	99,296.00	1,530.00	600.00			101,426.00	108,035.20	8,739.20	8.8%	36.59	47.02	19	54.88	6
Assistant Library Director (Head Technical Services)	Library	84,266.00	2,500.00	600.00			87,366.00	85,237.25	971.25	1.2%	36.95	47.49	13	40.80	4
							-		-						
Recreation Director	Recreation	99,079.00	975.00	600.00			100,654.00	97,944.00	(1,135.00)	-1.1%	45.76	58.80	17	50.75	6
Recreation Coordinator	Recreation	48,454.00		600.00			49,054.00	53,145.75	4,691.75	9.7%	26.12	28.78	9	27.54	3
Executive Director Melrose Memorial Hall	Memorial Hall	87,418.00	975.00	600.00			88,993.00	90,820.80	3,402.80	3.9%	33.88	43.54	16	48.96	5
Events Operation Manager Memorial Hall	Memorial Hall	18,824.00					18,824.00	19,948.14	1,124.14	6.0%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	20,335.00					20,335.00	20,521.90	186.90	0.9%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	18,776.00					18,776.00	19,571.76	795.76	4.2%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	5,255.00					5,255.00	5,541.15	286.15	5.4%	19.51	21.50	8	20.91	2
							-		-						
Water-Sewer Administrator Billing	Sewer	73,422.00	775.00	600.00			74,797.00	75,313.00	1,891.00	2.6%	30.80	39.58	12	38.25	4
									-						
Superintendent of Parks	Mt Hood/Parks	99,080.00	1,175.00	600.00			100,855.00	97,944.00	(1,136.00)	-1.1%	45.76	58.80	17	50.75	6
							-		-						
Executive Director - Melrose Contributory Retirement	Retirement	121,178.14	775.00	600.00			122,553.14	117,031.95	(4,146.19)	-3.4%	44.40	48.91	18	52.79	6
							-								
							Total Adjustment		217,034.75						

1. Fiscal 2023 is based on a 53 week Payroll Budget.
2. Please note this chart was prepared to demonstrate total compensation for employees **inclusive of** longevity, potential SLBB and Stipends and to show the proposed monetary change by position.
3. The funding request of \$167,309.63 Council Order 2023-29 represents the budgetary impact of these adjustments **and takes into consideration any departmental changes since the budget was approved in June 2022.**
(such changes are due to regionalization pending Council approval, staffing changes, vacancies, temporary out of grade assignments to cover for leaves)
4. The funding order doesn't reflect the total adjustment since certain positions are funded through ARPA, grants, regional budgets and other sources and they have absorbed a portion of the adjustment.
5. The Health Director proposed grade is representative of the proposed salary prior to the regionalization with Stoneham, which is pending approval of Council.
6. 21 of the positions have outgrown the current salary schedule and receive only COLA, without any steps.
7. Few positions have a base salary that is higher than the proposed hourly maximum, their salary will not be reduced, and will only be eligible for COLA going forward.
8. A negative percent adjustment reflects a slower salary progression than the current plan.
9. Report produced 11/3/22 by the Auditor and HR depts.

Questions Received from Councilors regarding Compensation Study and CBA Orders

1. Provide a 10-year history of all approved withdrawals from the contract stabilization account and indication of what was approved (e.g., in X year the council approved Y amount to go toward funding retro raises for Z collective bargaining agreement).

Please see attached Stabilization History.

2. Provide a copy of the compensation study completed by the consultant any related documents-Please see attached Compensation and Classification plan documents.

3. Provide a list of any identified non-union positions that are currently identified for a compensation adjustment under order 2023-29 to maintain compliance with the MA Equal Pay Act.

The Mass Equal Pay Act requires that employees performing equal or comparable work are compensated equally. "Equal work" involves similar skill and responsibilities and is performed in similar working conditions. The methodology HRS used involves the components required by MEPA and by creating one consolidated compensation plan and a classification plan it ensures that the pay equity matches the MEPA requirements. It is hard to isolate which positions require adjustments solely related to MEPA compliance. The Comp and Class study HRS conducted is different from a pay equity study, disparity study or gender analysis, all of which involve a deeper analysis of compliance with the Mass Equal Pay Act. The Comp and Class study focuses on the positions themselves not the employees in the positions, which is what a pay equity study does, as it takes into consideration the individual longevity, personal qualifications, the education/ training and the performance of the individual employees. The Comp and Class study has built the elements of MEPA into its methodology, job analysis, job evaluation, along with external market analysis, which sets the foundation of a system that is externally and internally equitable.

4. List of all positions by job title and department slated to be adjusted under the 2023-29 funding request. For these positions, total current annual compensation, inclusive of stipends, COLAs, and any other monetary compensation paid out of all City funds (operating and enterprise).

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22".

5. Orders 2023-30 and 2023-31 reference that the funding request is for FY 23 funding for a union contract.

- When was this contract settled?

The MOUs were executed September 23, 2022 (Clerical) and October 4, 2022 (Laborers).

- Are these raises retro to the start of the fiscal year?

The previous contracts expired at the end of FY22. The new contracts are effective with the start of FY23, therefore the budgeted raises are retro to the start of the fiscal year.

- Were any of these raises budgeted for in the current FY 23 budget, or is the totality of the increases being absorbed through the stabilization and retained earnings fund?

As is the customary budgeted practice, any FY23 step increases were budgeted based on the old contract, which was the known amount when FY23 budget was set. The stabilization fund absorbs only partially increases.

6. What is the stated purpose for the contract stabilization, water retained earnings, and sewer retained earnings funds? Is this stated purpose set by: state statute/charter/city admin/all of the above? The "Contractual Obligations and Salary & Wages Stabilization Fund" was established in 2006 by Council Vote 06-221 and in accordance with MGL Chapter 40, Section 5B. Water Retained Earnings and Sewer retained earnings were established under MGL Chapter 44, Section 53F ½ for Enterprise Funds.

7. What is the City relying on to justify paying non-union comp adjustments from the contract stabilization fund?

The stabilization fund was created for the purposes of contractual obligations as well as salary and wages. The adjustments resulting from the Comp and Class study are one-time non-budgeted salary adjustments, therefore the stabilization fund is used to fund part of these adjustments.

8. Did the classification review the compensation for both full time and part time employees? Among the positions reviewed we have both full time and part time employees.

9. Can you provide what positions have other compensation and what are the "Other" items? Under "other compensation" we consider stipends, longevity, sick leave incentives.

Below are the positions receiving a stipend (see list below, amount of stipend and reason for it).

Position	Stipend Position	Stipend Amount
Exec. Legal Assistant	Liquor Commission	\$6,500.00
Exec. Legal Assistant	Retirement Board	\$3,000.00
CFO/Auditor	Retirement Board	\$3,000.00
City Clerk	Clerk/City Council	\$4,000.00
City Clerk	Board of Registrars	\$1,500.00
Police Chief	Retirement Board	\$3,000.00
Assessor	Board of Assessor	\$4,347.00
Treasurer	Retirement Board (working with)	\$1,000.00
DPW Director	job specific licenses	\$1,000.00
Deputy City Engineer	job specific licenses	\$1,000.00
City Engineer	job specific licenses	\$1,000.00

Longevity is an annual bonus that benefit eligible non-union employees receive based on continuous years of service with the City, following the schedule below:

Years of Continuous Service	Annual Lump Sum Compensation
5 years, but less than ten 10 years	\$ 775.00
10 years, but less than 15 years	\$ 975.00
15 years, but less than 20 years	\$ 1,175.00
20 years, but less than 25 years	\$1,530.00
25 years, but less than 29 years	\$1,950.00
29 years or more	\$2,500.00

Non-union benefit eligible employees are reimbursed earned unused sick time in accordance with the schedule below. The maximum reimbursement they are eligible for per year is \$650.

If employee uses:	Less than 24.9% of available sick days (0 to 2.9 days/0 to 20.9 hours)	Receives \$50.00/day for remaining unused days
	between 25% - 49.9% of available sick days (3 to 5.9 days/21 to 41.9 hours)	Receives \$40.00/day for remaining unused days
	between 50% -74.9% of available sick days (6 to 8.9 days/42 to 62.9 hours)	Receives \$30.00/day for remaining unused days.
	75% or more (9 to 12 days/63 to 84 hours)	Zero reimbursement
In all instances, the applicable percentages shall be rounded down.		

10. Please provide by position side by side the old min and max salary and the new min and max salary.

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22"

11. Please provide by position the dollar increase along with the percentage.

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22"

12. You state in your memo that periodically we should do a cost of living increase in the compensation structure. How do you define periodically?

This is a discretionary decision of the Mayor and the CFO. Depending on the economy, employers are advised to apply COLA to their compensation plan to ensure that the pay is still appropriate, competitive with the changing economy and not stagnant. Union employees have COLA applied to the comp plans every year.

13. If an employee is above the range how will their annually compensation work every year?
They will only receive COLA going forward.

14. Are there any collective bargaining units within the City (including those under MPS) that are not eligible to access the contract stabilization fund? If so, why? There are no CBAs that are restricted from using the Contractual Obligations and Salary & Wages Stabilization Fund.

Ghobrial, Andrew

From: Maryandjoe Pelrine <[REDACTED]>
Sent: Monday, November 7, 2022 10:20 AM
To: City Council
Subject: Tonights meeting

Good Morning All,
 What a beautiful day!
 I am not sure if I can attend tonight.
 On these orders

2023-29 funding for HRS compensation study. I thought that this study was completed already.
 Why is a total of \$ 7534.00 coming out of W & S retained earnings to pay for this?

2023-30 Funding for the clerical union contractual This time W & S retained earnings is being
 tapped for \$ 8792.00. Why wouldn't this line be covered entirely by the contract stabilization account?

2023-31 Funding for the labor's union contract. This time the W & S retained earning is being
 tapped for \$ 18,294.00. Again why isn't the contract stabilization account covering all of this?

Total \$ 34,620.00 is a lot of money.
 How did the city come to these percentage totals for each of these items?

It would seem to me that when the budget was approved, each of these line lines were accounted
 for, and funded, and now more money needs to be allocated?

With all of our water bills through the ceiling, How is that there \$34,620.00 in these retained earning
 accounts? Are we being charged to much for W & S?
 What are retained earning accounts?

Thanks for all you do for the City of Melrose.

Joe

****CITY OF MELROSE PUBLIC RECORDS NOTICE: Please be advised that the Massachusetts Attorney General has
 determined that email is a public record unless the content of the email falls within one of the stated exemptions under
 the Massachusetts Public Records Laws.****

Attachment: Pelrine_Redacted (ORDER-2023-30 : An Appropriation from Contract Stabilization to fund the Clerical Union)

Ghobrial, Andrew

From: Eugenia Gibbons <[REDACTED]@com>
Sent: Monday, November 7, 2022 5:54 PM
To: Cinella, Christopher; Jamaledine, Maya; Migliorelli, Leila; Eccles, Jack; Karamcheti, Manjula; Williams, Ryan; Stewart, Robert; Obremski, John; Garipay, Mark; MacMaster, Shawn; Grigoraitis, Jennifer
Cc: Ghobrial, Andrew; *Mayor Brodeur; Withey, Dorie; O'Connell, Ed; McAndrew, Jennifer; DeSelm, Lizbeth; Razi-Thomas, Jennifer; Driscoll, Margaret
Subject: Public Comment - 11/7 Appropriations Committee Meeting

I request that these comments be read at the meeting so they may be included in tonight's public record.

Dear esteemed members Melrose City Council,

I was hoping to attend this evening's appropriations committee meeting, but work obligations prevent me from doing so. And so I am sharing with the full committee concerns about tonight's agenda items that I have already expressed to my ward councilor, Ryan Williams.

Of particular concern are requested approvals for a salary study and pay raises for certain city personnel funded from a contract stabilization account.

Even if this is standard practice or perfunctory in nature, it is perplexing why such a request would be made at a time when the district has yet to resolve contract negotiations with teachers/paras, the FY23 school department budget is being reconstructed, and questions remain about the extent to which the city will need to modify its anticipated contribution to make the current (and potentially FY24) budget whole.

Given that the school budget is a significant portion of the city budget it stands to reason that the city budget, including a \$1M + reserve sitting in the contract stabilization fund, is also in need of thorough review.

Without question, staff deserve raises. And any suggestion to hold this question until further review is NOT a commentary on the merits of well-deserved salary increases for essential city personnel. Rather, it is a request that such allocations are accurately accounted for in the budget alongside and not at the expense of other city and district obligations, like teachers, student resources, or other unforeseen expenditures.

Shortsighted maneuvers like this contribute to the structural issues that have been in sharp focus in recent weeks.

Assuming these items are taken up this evening, it would be prudent for the requests to be held in committee until the city and the district are able to provide clarity and further insight into the status of the FY23 budget and a timeline for when the contract with teachers will be resolved - actions that will also help to restore public trust.

I strongly urge you to consider this and hold these items until resolution has been met on a contract and the budget.

Thank you for your service and for your time and consideration.

Sincerely,
 Eugenia Gibbons
 Ward 7 Resident

CC: Mayor Brodeur & Members of Melrose School Committee

Attachment: Gibbons_Redacted (ORDER-2023-30 : An Appropriation from Contract Stabilization to fund the Clerical Union)

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Attachment: Gibbons_Redacted (ORDER-2023-30 : An Appropriation from Contract Stabilization to fund the Clerical Union)

Ghobrial, Andrew

From: Golden, Kerriann
Sent: Friday, October 28, 2022 12:42 PM
To: Grigoraitis, Jennifer
Cc: Dello Russo, Patrick; Phillips, Shannon; Latta, Polina; Ghobrial, Andrew; Cinella, Christopher
Subject: RE: Request for additional documentation for orders 2023-29, 2023-30, 2023-31
Attachments: 8404ContractStabilizationHistory.pdf; 2006-221 Creation of Contractual Obligations S&W Stabilization Fund.pdf

Good Morning Councilor Grigoraitis,

Patrick and I are providing the information for the questions below that are relevant to our piece. Attached please find a 10 year history of the Contract Stabilization Fund. This fund was established by the Council Order attached 06-221.

-Contract Stabilization was established by Council Vote 06-221 and in accordance with MGL Chapter 40, Section 5B.
 -Water Retained Earnings and Sewer retained earnings were established under MGL Chapter 44, Section 53F ½ for Enterprise Funds.

There are no CBAs that are restricted from using the Contractual Obligations and Salary & Wages Stabilization Fund.

For orders 2023-30 and 2023-31- Yes, these raises will be retro to the start of Fiscal Year 2023. For the FY 2023 budget, Steps and longevity changes were budgeted. Appropriation Orders 2023-30 and 2023-31 represent the COLA negotiated with both Local 272 Clerical and Local 272 Laborers.

Thanks
 Kerri
 Assistant City Auditor
 City of Melrose
 562 Main Street
 Melrose, MA 02176

From: Grigoraitis, Jennifer <jgrigoraitis@CityofMelrose.org>
Sent: Monday, October 24, 2022 11:27 AM
To: Latta, Polina <platta@CityofMelrose.org>; Dello Russo, Patrick <PDelloRusso@CityofMelrose.org>; Phillips, Shannon <sphillips@CityofMelrose.org>
Cc: Ghobrial, Andrew <aghobrial@CityofMelrose.org>; Cinella, Christopher <ccinella@CityofMelrose.org>
Subject: Request for additional documentation for orders 2023-29, 2023-30, 2023-31

Good morning,

My understanding is that some combination of the three of you will be before the Appropriations & Oversight Comm to speak to these three orders. In advance of that meeting (which I know Andrew is working to get scheduled), I would like to receive the following additional information:

Attachment: Request for additional documentation for orders 2023-29, 2023-30, 2023-31 (ORDER-2023-31 : An Appropriation to fund the Local

- ten-year history of all approved withdrawals from the contract stabilization account and indication of what was approved (e.g., in X year the council approved Y amount to go toward funding retro raises for Z collective bargaining agreement)
- Copy of the compensation study completed by the consultant any any related documents
- A list of any identified non-union positions that are currently identified for a compensation adjustment under order 2023-29 to maintain compliance with the MA Equal Pay Act
- List of all positions by job title and department slated to be adjusted under the 2023-29 funding request
 - For these positions, total current annual compensation, inclusive of stipends, COLAs ,and any other monetary compensation paid out of all City funds (operating and enterprise)

Additional questions (that I am happy to discuss beforehand and also anticipate asking in the meeting):

- What is the stated purpose for the contract stabilization, water retained earnings, and sewer retained earnings funds? Is this stated purpose set by: state statute/charter/city admin/all of the above?
- Are there any collective bargaining units within the City (including those under MPS) that are not eligible to access the contract stabilization fund? If so, why?
- Orders 2023-30 and 2023-31 reference that the funding request is for FY 23 funding for a union contract. When was this contract settled? Are these raises retro to the start of the fiscal year? Were any of these raises budgeted for in the current FY 23 budget, or is the totality of the increases being absorbed through the stabilization and retained earnings fund?

Thank you.

Best,

Jen

Jen Grigoraitis, she/her/hers

Ward 6 Councilor, City of Melrose

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Established Council Order 06-221 in accordance with MGL Chapter 40, Section 5B		
8404 Contract Stabilization		
Detail	Description	Funding Orders
Opening Balance Fiscal year 2013		
2014-74	Clerical - 1 Year	(17,104.23)
2015-102	Library 1 Year	(12,343.95)
2016-55	Laborers 1 Year	(73,241.53)
2016-56	Laborers 1 Year Cemetery	(19,718.89)
2017-39	Fire 2 Years	(369,520.22)
2017-36	Clerical - 1 Year	(9,593.40)
2017-109	Patrol 2 Years	(213,259.09)
2018-55	Library 1 Year	(13,000.00)
2018-152	Fire 1 Year	(103,750.00)
2019-52	Police 1 Year	(101,827.00)
2020-17	City Solicitor - Liquor Commission stipend	(5,000.00)
2020-18	Clerical - 1 Year	(61,138.14)
2022-42	Fire - 2 Years	(317,693.00)
		(1,317,189.45)



CITY OF MELROSE
In Board of Aldermen

June 5, 2006

AN ORDER
06-221

Creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund", in accordance with Massachusetts General Laws Chapter 40, Section 5B

Offered by Mayor Robert J Dolan
BE IT ORDERED

that, the creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" Number 8404, in accordance with Massachusetts General Laws Chapter 40, Section 5B be, and hereby is passed.

PASSED

JUN - 5 2006
[Signature]
President of the Board of Aldermen

APPROVED

JUN - 7 2006
[Signature]
MAYOR

Attachment: 2006-221 Creation of Contractual Obligations S&W Stabilization Fund (ORDER-2023-31 : An Appropriation to fund the Local 272



CITY OF MELROSE

Melrose, 25 ^{MA} June 2006

The Committee on

Appropriations

To Which Was Referred Paper No.

06-221

Entitled

Creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund", in accordance with Massachusetts General Laws Chapter 40, Section 5B

REPORTS as Follows:

that it recommends passage of the Order.

For the Committee

Robert A. Boisselle

Chairman



CITY OF MELROSE

MELROSE CITY HALL
562 Main Street
Melrose, Massachusetts 02176

Telephone: (781) 979-444
Fax: (781) 662-218

ROBERT J. DOLAN
Mayor

May 11, 2006

To the Honorable Board of Aldermen:

I respectfully request the creation of a new stabilization fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" in accordance with Massachusetts General Laws Chapter 40, Section 5B

Robert J. Dolan
MAYOR

GUIDELINES:**I. MULTIPLE STABILIZATION FUNDS****A. Creation of Funds**

Stabilization funds may be created for one or more different purposes. G.L. Ch. 40 §5B. A fund may be created for a broad category of spending purposes, *e.g.*, any lawful purpose, capital budget purposes or purposes for which the community may borrow money. It may also be created for a specific purpose or project, *e.g.*, acquire a new fire truck or undertake a particular school construction project.

Creation of a fund requires a ~~(two-thirds vote)~~ of the legislative body of the city, town or district. The vote must clearly define the purpose(s) of the fund.

B. Pre-existing Fund

Any pre-existing stabilization fund balance should continue to be treated as a reserve for any lawful purpose, *i.e.* a "general" stabilization fund. The city, town or district can reallocate or earmark all or part of that balance to any new stabilization funds it creates by a vote to transfer monies from that "general" stabilization fund to the newly created fund. See Section I-D below.

C. Changing Fund Purpose

The purpose of a stabilization fund may be changed at any later time by a two-thirds vote of the legislative body. For example, if a community had established a fund in order to reserve monies to acquire a new fire truck and a balance remains after the purchase, the legislative body could vote to change the purpose to meet some new savings objective.

If a Proposition 2½ levy limit override was approved for the purpose of funding the particular stabilization fund, however, the city or town must also follow the referendum procedure explained in Section II-C below to be able to change the fund purpose and then continue using the additional levy capacity resulting from that override in future years.

D. Appropriations and Transfers

Appropriations into and from any stabilization fund require a two-thirds vote of the legislative body.

**CITY OF MELROSE**

MELROSE CITY HALL
562 Main Street
Melrose, Massachusetts 02176

Telephone: (781) 979-4444
Fax: (781) 662-2111

ROBERT J. DOLAN
Mayor

May 11, 2006

To the Honorable Board of Aldermen:

I respectfully request the creation of a new stabilization fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" in accordance with Massachusetts General Laws Chapter 40, Section 5B

Robert J. Dolan
MAYOR

PUBLIC HEARINGS

Public Hearing Set _____

Melrose Free Press _____

MMTV _____

Public Works Notified _____

Utilities Notified _____

Abutters Notified _____

Post Call _____

Invoice _____

LICENSES

Sent Fire ☐ CORI ☐

Building ☐ Health ☐

Wts. & Meas. ☐ Police ☐

Rec'd Fire ☐ CORI ☐

Building ☐ Health ☐

Wts. & Meas. ☐ Police ☐

Class II Bond ☐

Workers Comp Affidavit ☐

CLAIMS

Auditor ☐ City Solicitor ☐

Public Works ☐ _____ ☐

_____ ☐ _____ ☐

emailed to department heads ☒

Ordinances changes: _____

Mailed to General Code ☐

Copy to Book ☐

APPOINTMENTS

Letter ☐ Oath ☐

Nº 06-22 / original date May 15, 2006

In Board of Aldermen

Referred to Committee on

Appropriations

Creation of a new Stabilization Fund entitled
"Contractual Obligations and Salary & Wages
Stabilization Fund", in accordance with
Massachusetts General Laws Chapter 40, Section
5B

JUN 05 2006

Passed as amended ☐ Passed ☒

Rule _____ suspended ☐ Defeated ☐

Immediate consideration ☐ Place on file ☐

Reconsideration defeated ☐ Reconsidered ☐

Leave to withdraw ☐ Tabled ☐

Granted, adopted, confirmed ☐ Recommended ☐

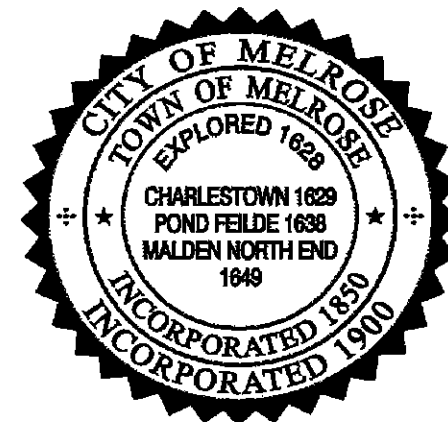
Null & Void ☐

Ordained Roll Call ☒ Yea ☐ Nay

Mary Rita O'Shea
Clerk

Aldermen	Yea
Boisselle	☒
Brodeur	☒
Buonopane	☒
Conn	☒
Forbes	☒
Heavey	☒
Mortimer	☒
Seaboyer	☒
Tramontozzi	☒
Wright	☒
Infurna, Pres.	☒

TOTAL	10	0
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CITY OF MELROSE

Legal Department

Shannon Phillips
City Solicitor
SPhillips@cityofmelrose.org

City Hall, 562 Main Street
Melrose, Massachusetts 02176
Telephone - (781) 979-4184

To: Honorable Melrose City Council

From: Shannon Phillips, City Solicitor

Re: ***Order 2023-30 and Order 2023-31***

Date: November 3, 2022

Dear Honorable Council Members:

The two above-referenced orders are before you as the result of successor contracts being reached with two of our City Unions- Laborers' 272 and Clerical 272- effective Fiscal Year 23 to Fiscal Year 25- beginning June 27, 2022 and ending June 29, 2025.

Memorandum of Agreements were executed by the Unions (after ratification votes) and the City the end of September 2022, subject only to funding of the economic items by the Melrose City Council.

As a result, the above-referenced orders are requesting funding for pay due to the members of both Unions for Fiscal Year 23.

The major economic terms agreed upon in these contracts are as follows:

Clerical Union Financial Highlights:

- Cost of living adjustments: FY23- 2%; FY24-1.75%, FY25- 1.75%
- Second and third years of contract one new step will be added to the salary schedule which will be 2% higher than the previous step in an effort to retain senior staff by providing for salary growth.
- Effective FY23 all elementary school nurses move up one group to Group 14 (same as other school nurses)- at the step closest to but higher than their current rate of pay in an effort to maintain internal equity and retain such hard to fill positions.

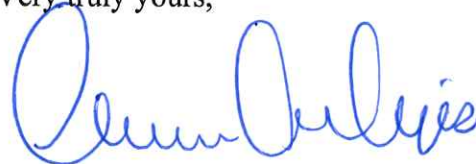
- Effective FY23 move all clerical jobs listed in Group 9 to Group 10 to the step closest to but higher than their current rate of pay. This was done to make the lowest paid union positions more competitive within the labor market and attract and retain employees.

Laborers' Union Financial Highlights:

- Cost of living adjustments as follows: FY23- 1.75%; FY24-1.75%, FY25- 1.75%
- One new step will be added on salary schedule, 2% higher than the previous step, each year of the contract in an effort to retain senior staff by providing for salary growth.

I will be present at Monday night's Appropriation and Oversight Committee meeting to answer any questions you may have.

Very truly yours,



Shannon Phillips

FY23 CLASSIFICATION PLAN	
City of Melrose	
Grade / Position	
6	
<i>No Positions Assigned</i>	
7	
<i>No Positions Assigned</i>	
8	
Administrative Assistant-PT (Veterans, Recreation, Police)	
Event Operations Assistant - Memorial Hall	
Pine Banks Laborer	
9	
Animal Control Officer - PT	
Assistant Parks Superintendent	
Human Resources Assistant	
Program Coordinator - MA in Motion	
Program Coordinator - Tobacco/Alcohol	
Recreation Coordinator	
10	
Assistant to the Director of Inspectional Services	
Executive Assistant to City Solicitor	
Executive Office Manager - Police	
Finance Administrator - Fire Dept./Public Safety	
Milano Center Manager (COA)	
11	
Assistant City Clerk	
Clerk of Committees	
Finance Manager (Auditing)	
Public Health Specialist	
12	
Cemetery Administrator	
Communication and Community Outreach Coordinator	
Emergency Management Director	
Local Building Inspector (Certified)	
Plumbing and Gas Inspector	
Sealer of Weights and Measures	
Project Engineer	
Water-Sewer Administrator (Billing)	
Wiring Inspector	
13	
Assistant Library Director/Head of Technical Services	
Assistant Treasurer	
Building Systems Supervisor - DPW	
Human Resources Coordinator	
Project/ Systems Administrator	
Senior Planner	
Sustainability Manager	
Systems Analyst IT (city and schools) - networks/databases	

FY23 CLASSIFICATION PLAN
City of Melrose
Grade / Position
14
Veterans Services Director (Regional Position)
15
Director of Economic Recovery and Business Development
16
Assistant Director of IT
Executive Director Melrose Memorial Hall
City Clerk
17
Deputy City Engineer
Financial Systems Analyst/Project Manager (Auditor/IT Depts.)
Recreation Director
Superintendent of Parks (Mount Hood. Golf Course,Open Space)
18
Assistant Auditor
Council on Aging Director
Executive Director - Melrose Retirement System
Facilities Manager - City and Schools
Operations Manager - DPW
19
Assistant Director - DPW Administration and Finance
Chief Assessor
City Engineer
Director of Community Development and Planning
Director of Inspectional Services/Building Commissioner
Director of Strategic Initiatives and Communications
Health Director (Regional)
Library Director
Treasurer/Collector
20
Assistant City Solicitor
21
Chief Information Officer (city and schools) / IT Director
Human Resources and Labor Relations Director
22
<i>No Positions Assigned</i>
23
Chief Financial Officer and City Auditor
City Solicitor - Labor Counsel
Director of Public Works

MELROSE CONSOLIDATED CNU PROPOSED FY2023 PAY PLAN

Step Grade	1	2	3	4	5	6	7	8	9	10
8	20.91	21.33	21.76	22.20	22.64	23.09	23.55	24.02	24.50	24.99
9	27.54	28.09	28.65	29.22	29.80	30.40	31.01	31.63	32.26	32.91
10	31.62	32.25	32.90	33.56	34.23	34.91	35.61	36.32	37.05	37.79
11	34.75	35.45	36.16	36.88	37.62	38.37	39.14	39.92	40.72	41.53
12	38.25	39.02	39.80	40.60	41.41	42.24	43.08	43.94	44.82	45.72
13	40.80	41.62	42.45	43.30	44.17	45.05	45.95	46.87	47.81	48.77
14	42.84	43.70	44.57	45.46	46.37	47.30	48.25	49.22	50.20	51.20
15	44.68	45.57	46.48	47.41	48.36	49.33	50.32	51.33	52.36	53.41
16	48.96	49.94	50.94	51.96	53.00	54.06	55.14	56.24	57.36	58.51
17	50.75	51.76	52.80	53.86	54.94	56.04	57.16	58.30	59.47	60.66
18	52.79	53.84	54.92	56.02	57.14	58.28	59.45	60.64	61.85	63.09
19	54.88	55.97	57.09	58.23	59.39	60.58	61.79	63.03	64.29	65.58
20	57.63	58.78	59.96	61.16	62.38	63.63	64.90	66.20	67.52	68.87
21	62.99	64.24	65.52	66.83	68.17	69.53	70.92	72.34	73.79	75.27
22	66.10	67.42	68.77	70.15	71.55	72.98	74.44	75.93	77.45	79.00
23	75.07	76.57	78.10	79.66	81.25	82.88	84.54	86.23	87.95	89.71



HUMAN RESOURCES SERVICES, INC.
Management Consultants to Local Government

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CITY OF MELROSE, MASSACHUSETTS



COMPENSATION AND CLASSIFICATION STUDY
Non-Union Positions

FINAL REPORT

April, 2022



HUMAN RESOURCES SERVICES, INC.
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April, 2022

Mayor Paul Brodeur
 City of Melrose
 562 Main Street
 Melrose, MA 02176

Dear Mayor Brodeur,

Human Resources Services, Inc. (HRS) is pleased to present this ***Compensation and Classification Study for Non-Union employees*** to the City of Melrose, MA. This report represents the culmination of a detailed position classification and compensation review for all non-union employees engaged in a variety of municipal work activities. This report, along with the Organizational Needs Assessment Report submitted separately provides the City of Melrose with the totality of the analysis as it was conducted for the City. The City had made the decision that the two elements (comp/class and organization review) of the consulting engagement should be developed for better efficiency and implementation.

In particular, we wish to thank the Human Resources and Labor Relations Director, the Chief Financial Officer/Auditor, Mayor's staff, and non-union employees and managers who have contributed significantly to this effort. Employee input through forms and on-site interviews, as well as comments and suggestions received, made a valuable contribution to the study. We greatly appreciate everyone's ability to meet with us and provide information in a timely manner. HRS will remain available

to answer any procedural questions the City may have in the implementation of the study's recommendations. While this is a final report, we will remain available to make any modifications needed to make this a useful tool for the City.

Very truly yours,

Sandy

Aleksandra E. Stapczynski
President



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CITY OF MELROSE, MASSACHUSETTS COMPENSATION AND CLASSIFICATION STUDY FOR NON-UNION

I. Introduction

A. Scope of Services

The City of Melrose, MA retained Human Resources Services, Inc. to conduct a comprehensive compensation and classification study of Non-Union Positions. This study was commissioned to examine the responsibilities, work performed, and market pay rates for each position included in the study. In general, the study involved developing new job descriptions, classifying those positions according to a uniform point analysis standard, surveying the market of comparable municipalities and other organizations as needed to determine representative rates of compensation, and developing and *recommending* a new compensation and classification plan and system for the non-union group of positions.

The objectives of the study were to:

- Develop a job evaluation system that would encompass all non-union positions and ensure that compensation levels were both internally equitable and externally competitive.
- Develop for the City the necessary guidelines for administering compensation on an ongoing basis to ensure that pay levels remain equitable and competitive.

In scope, the study included all non-union positions (approximately 70 in number). Another approximate dozen positions were evaluated for

compensation only for the organizational review and staffing needs.

HRS' approach to the study was comprehensive. The study began by collecting job content information for those positions to be evaluated. Job content evaluation factors and appropriate factor weightings were prepared and analyzed. The evaluation process involved a comparative approach where each position was compared to all others on each evaluation factor, one factor at a time.

A grade structure was developed by tabulating competitive data for the benchmark positions and studying trends in the market. A tentative pay structure and classification listings were presented to the City for their consideration. Employee listings comparing each individual's salary to the proposed structure and associated implementation costs were prepared for Finance.

This report is prepared for the City to document in detail the procedures for position evaluations and gradings and development of the salary structure. It also sets forth the recommendations for the implementation and ongoing administration of the system.

Through the consultant teams evaluation comparing both market data and job ratings point totals, it was determined the appropriate number of salary levels needed to clearly differentiate varying levels of job value. Twenty-three salary levels emerged as a suitable number for the City to develop a new consolidated non-union compensation and classification plan. Positions were assigned to a salary grade level on both the basis of its total point scores, and the external job market.

A position compensation and classification plan is an essential component of a total personnel administration program. The perception that the compensation plan is objective and fair in its assignment of pay to individual positions lends credibility to the organization's entire personnel system. This study and its recommended plan is derived from a systematic, formalized and objective method for developing equitable job groupings and compensation levels for all positions covered. An underlying assumption is that all positions and individuals should receive "equal pay for equal work." However, the initial implementations of the recommended plans are not the final steps in achieving job equity. Rather it establishes a uniform point of beginning from which to regularly review and ensure that decisions regarding position requirements and compensation accurately reflect the organization's current service needs and the performance of employees. Each new position established and adjustments to the plan need to be done in a consistent manner to maintain the plan's integrity and relevance.

According to the Massachusetts Employment Pay Act, (MEPA), employees doing equal work should be paid equally. Our methodology and system addresses the major components required of MEPA. For work to be equal or comparable, it must involve substantially similar skill, effort, and responsibility, and be performed under *similar* working conditions, but are not necessarily identical or alike in all respects. The requisite requirements or skill includes an employee's experience, training, education, and ability to perform the jobs. An employee's skill must be measured in terms of the performance requirements of a job, that is why it is important to always ensure that the job descriptions are up to date and accurate so employees know what is expected of them in their jobs. Effort refers to the amount of physical or mental exertion needed to perform a job. Finally, responsibility encompasses the degree of discretion or accountability involved in performing the essential functions of a job.

For maximum effectiveness, the relationship between consultant and client must be a cooperative effort. While Human Resources Services assumes responsibility for all final recommendations, client input has been actively sought, carefully weighed and incorporated into the report whenever possible and appropriate.

B. Specific Study Process

This project included the following steps:

- *Organizational Meeting* with Mayor, HR Director, and Finance to discuss the goals and objectives of the study; and to orient top executives on the process and methodology that would be used.
- Several *Orientation Meetings* with employees and managers to explain project activities, objectives, methodology. Position Analysis Questionnaires were distributed to employees at these orientation sessions. The meetings also gave everyone an opportunity to meet HRS consultants and to ask questions.
- A thorough *Job Analysis Process* which involved reviewing position duties and responsibilities (essential functions) and requisite requirements of the job, utilizing position analysis questionnaires and on-site interviews with all employees.
- Preparation of updated *Job Descriptions* with review and comment from employees, managers and HR staff. The client had an opportunity to

thoroughly review the draft job descriptions.

- A thorough *Job Evaluation Process*. Position rating and ranking utilizing HRS' rating manual.
- Development of a *Classification Plan*. Position assignment to grades based on a system of objective evaluation.
- Thorough *Market Analysis* using primarily comparable municipal organizations jointly selected by the City of Melrose and HRS.
- Establishment of *Compensation Schedule* using comparative wage data as a general guide.
- Several *meetings in person and through telephone conference* with the *Chief Financial Officer and Human Resources Director* to discuss pay policies and review draft work products (i.e. job descriptions, classification plan, salary schedule, comparative data, ratings, and other related project documents).
- General guidance on *Implementation*.
- Final *Presentations* to the City and employees shall be given upon request of the City. Based on any additional information received, HRS shall make adjustments as appropriate and amended the Final recommendations.

- Final preparation of *Report* to the City of Melrose with explanation of recommendations and methodology.

The following documents have been prepared for the City of Melrose:

- Proposed Position Titles
- Proposed Classification Plan
- Proposed Compensation Plan
- Compensation Comparisons Chart
- Market Data Analysis
- Placement and Costing out of Compensation Plan
- Position Analysis Question (PAQ)
- Updated Job Descriptions for each Position
- Evaluation Materials and Documents
- HRS Position Rating Manual

II. Job Descriptions

A. Preparing the Job Descriptions

One major aspect of this study involved the development of updated job descriptions. Through the job analysis process, HRS discovered that many of the current job descriptions were outdated and there was no consistent format for descriptions. HRS' proposed job descriptions are submitted to the City of Melrose as part of this final report; they are provided in electronic Word format only. They also provide the necessary language to aid in recruiting minority employees, as the City has made diversity and inclusion a major emphasis in all recruitment efforts.

In addition to assisting with the development of job analysis and classifications, good descriptions produce many other important benefits. These job descriptions emphasize the purposes of each position and the types of results which each incumbent is expected to produce. Representative examples of the work performed and minimum qualification requirements are listed. These job descriptions are small but important components of more comprehensive personnel, organizational and administrative systems or plans. They can and should be used not only for recruitment and promotion, but as tools to assist in the administration of the City. They help define initial expectations, provide fundamental building blocks for administering compensation systems, and give additional definition to organizational charts. Because they focus on purposes and results, they can and should be used when developing employee objectives, performance plans and performance appraisals.

The job descriptions presented to the City are up-to-date, clear, and identify the duties of each position, as well as the education, experience, training, knowledge, ability, and skills, and competency levels required.

B. The Significance of Job Descriptions.

Today, job descriptions have become more important than ever. Although employers are not required by law to have written job descriptions, there are many laws that impact the employer-employee relationship and having job descriptions can help the organization comply with those regulations. There are federal laws such as the Fair Labor Standards Act (FLSA) that impact employees. Other laws, such as federal discrimination statutes, prohibit discrimination against various protected classes. Because job descriptions document the duties and qualifications of a job, they can help support why one applicant was qualified and another was not, why one position pays more than another, or why an employee is terminated for poor performance.

Under the ADA, job descriptions, particularly the lists of duties and responsibilities, take on new significance. The purpose of the ADA is to ensure that individuals *with* disabilities be given the same consideration for employment that individuals *without* disabilities are given. Essential functions are the primary or fundamental job duties intrinsic to a position, that is, the duties that are essential to achieving the objectives of the job. Related to the essential functions or duties are the tools and equipment used to perform the essential job functions, the physical demands of the job duties, and the work environment in which the duties are performed.

The new job descriptions include: (1) prerequisites for each position, including the physical needs, knowledge, ability, and skill, education, training and experience; (2) essential job functions; and (3) work environment. All job descriptions should be reviewed and updated periodically to ensure accuracy. Positions can change for many reasons: (1) an incumbent starts assuming more responsibilities in addition to the duties in the job descriptions, (2) staff changes, (3) changes in procedures and

processes, (4) new technology, tools, or machines, (5) external regulations or legislation, (6) reorganizations, (7) new supervisor or manager.

In short, the process of developing accurate and uniform job descriptions forces the employer to analyze each position and to identify the position's necessary qualifications (the "requisite skill, experience, education, and other job-related requirements"), as well as to determine the position's "essential functions."

III. Classifying and Compensating Positions

A. The Classification Plan

It is important to consider the objectives of (1) **Job Analysis** and (2) **Job Evaluation** when reviewing the proposed classification plan. Building the classification plan involved both job analysis and job evaluation.

Of critical importance in the process of reviewing jobs are the inherent job factors and the particular skills or quality of work required of the position. A thorough **Job Analysis** produces, in general, five kinds of basic information to aid in this process:

1. *nature of the work* (e.g., essential functions and purpose/objective of the position)
2. *level of the work* (e.g., degree of complexity and accountability)
3. *job requirements* (e.g., the knowledge, skills, abilities and other special requirements/characteristics needed to perform the job)
4. *job qualifications* (e.g., minimum education, training and experience needed to qualify)
5. *working conditions* (e.g., the psychological, emotional and physical demands placed on employees by the work environment).

Information about each position studied was obtained through detailed position analysis questionnaires (PAQ) and employee interviews. Employees were asked to describe their positions in detail on the PAQ form. Examples of information requested from the PAQ included: job summary, essential functions, education, training and certifications, knowledge, ability, skill, experience, physical requirements, supervisory responsibilities, and technologies and equipment used. Finally, interviews were conducted to clarify and augment the employees' questionnaire responses.

Job Evaluation is a process that establishes the relative value of jobs within an organization. There may be several reasons for carrying out this process; the main ones are: (1) to establish the correct rank order or groupings of jobs, (2) to establish the relative distance between jobs within the ranking, (3) to provide an objective measurement of job size for comparison with other jobs and enable salary comparisons to be made.

Job evaluation is the process whereby positions are analyzed, measured and compared against a common set of criteria in a systematic and objective manner. Job evaluation does not produce a rate of pay. Rather, it produces a ranking of jobs in terms of "job content" around which a salary structure can be established. Similarly, the evaluation process does not measure an individual's performance. The evaluation looks at the job, not the job holder; it assumes that the job is being performed to a fully acceptable standard and that all the identified requirements of a job are being met.

Using a point-factor evaluation system, positions were rated by the consultants and then ranked and assigned a grade. Fourteen rating factors were used to rate all of the positions. These factors, detailed in HRS' Municipal Position Classification and Rating Manual, measured the requirements of each position in various areas. The following are a listing of each rating factor. The manual describes each factor in great detail and by degree.

1. Physical Environment
2. Basic Knowledge, Training and Education
3. Problem Solving Skills and Effort
4. Physical Skills and Effort
5. Experience
6. Interactions with Others/Customer Service
7. Confidentiality
8. Occupational Risks
9. Complexity
10. Supervision Received
11. Supervision Given
12. Supervision Scope
13. Judgment and Initiative
14. Accountability

As mentioned previously, job rating is not synonymous with performance evaluation. The position, not the incumbent, is evaluated, assigned points and a grade derived. One of the best information sources for rating a position is a current and relevant job description and/or a recently completed PAQ which is why these should always be completed early in the process. The process described in HRS' Municipal Position Classification and Rating Manual increases the uniformity and objectivity in the application of judgments about positions and the groupings of positions. This process can be used to update the proposed classification plan, to determine how to place new positions on the plan, and to re-grade a current position with adjusted duties to a different grade. Samples of the *Position Rating Summary Sheet* are included in the Manual along with the *Points Assigned to Factor Degrees*. A custom *Grade Determination Scale* was developed for the City of Melrose.

B. Market Survey and Developing the Compensation Plan

Human Resources Services, Inc. conducted a thorough salary survey and market analysis to determine the market competitiveness for positions included in this study. To measure the pay rates among competitors for these positions, HRS distributed custom survey documents to comparable municipal organizations jointly identified by the City and HRS. For this study, HRS received survey responses from the following Massachusetts municipalities for compensation, benefits and other related information:

1. Arlington
2. Newburyport
3. North Andover
4. Peabody
5. Reading
6. Salem

7. Saugus
8. Stoneham
9. Wakefield
10. Winchester; and
11. ERI and MMHR Data

The City of Melrose is a well-managed forward-thinking community with a history of a creative and complex organization. The consultant team met with city management/finance and human resources staff to review a draft pay/class plan and to review the market data collected and discuss its meaning. An initial analysis of the market data involved reviewing the average, median, range, 75th percentile and 90th percentile. A comparison was then made to current Melrose salaries for this non-union group of positions.

All of the comparative data is current information and presented on the following pages. Most of the data was collected during the fall of 2021. HRS collected minimum and maximum salary ranges from the comparable organizations. Certain data may have been pro-rated to hourly for comparison purposes only. In each cell, the top number indicates the minimum salary range for each position and the bottom number indicates the maximum salary range for each position. Virtually every organization had some type of a pay/class structure.

For each position analyzed, data points were collected from the labor market. The data points indicate the amount of salary information for each position surveyed. In some instances: (1) the organization did not have a comparable position; or (2) the consultants determined that the position was not comparable to the position in Melrose. HRS used professional discretionary judgment when comparing positions to the comparable data. If there was less than two data points of salary information for a position, HRS placed more emphasis on the position rating when placing the position on the compensation/classification plan. While this market analysis and information provides the City of Melrose with benchmark salary data to set the parameters for compensation decisions, the client must also consider the “uniqueness” of certain positions in the organization as well as the organization’s compensation policies. The compensation and classification plans are attached to this report for your review.

C. Description of Compensation and Classification Plan

Setting the rates of pay for jobs on the position hierarchy results in what is called a “pay structure”. When reviewing or developing pay rates, a number of major policy decisions are typically made. For example: How should the City’s pay rates compare to the market? How competitive does the City want to be? What type of structure is best for the City; steps, ranges, quartiles, etc. For what does the City want to pay? (i.e. job content, seniority, performance, cost of living, etc.) How does the organization currently pay its employees? The resulting compensation plan must reflect the City’s pay policies, the market place, internal job values, and the financial desire of the City to pay at a given level to attract needed talent. It should also ensure internal and external fairness. “Internal” being comparable worth within

the organization of the classification plan; and “external” being the market to ensure a competitive pay structure.

The proposed compensation and classification plan is presented on the following pages. Pay ranges were set for groups of positions which the consultants determined should be paid equally. There are twenty-three grades for this group and ten steps for each grade. There is 2 percent between each step. The City’s current pay structure for the non-union positions includes a variety of pay scales. These were consolidated into one uniform compensation plan, thus making it less complex. This will allow for more equity, especially when hiring new employees. Also the entire pay structure in its entirety has been updated to reflect the market. Comparative data was considered to set the grade parameters, while the classification process controlled the internal assignment of positions to progressive compensation levels. Currently, the City operates within a context of “pay steps” for this group of non-union positions. HRS recommends continuing the policy on pay steps for easier maintenance and consistency of the plan. In general the pay ranges were developed utilizing the salary market data and targeting approximately the 75th of market. It was necessary to target the 75th of market in order to remain competitive as compared to other advanced municipalities in Massachusetts. HRS provided the City with additional benchmark salary data too from its ERI (Economic Research Institute) database of salaries and wages.

The proposed compensation plan is based on current compensation data. This is a base salary plan and does not include compensation for stipends, cost-of-living, benefits, or other compensation. It is up to the City to determine its ability to pay with regards to implementation of this proposed pay plan.

Those employees falling below the grade range should be brought into the entry level of the grade ranges as soon as possible. The salary schedule should be updated with a cost-of-living for each succeeding fiscal year. The consultants costed the plans in a variety of ways for the finance department, but it is up to the City to determine the policy for implementation. HRS will of course remain available to provide the necessary guidance.

IV. Implementation and Other Recommendations

The following sections are intended to assist and guide the City of Melrose in implementing the proposed compensation and classification plan for non-union positions. Successful implementation will require a concerted effort by management, employees and city officials.

1. Compensation Structure and Maintenance

The recommended pay structure contained in this report is designed to provide appropriate compensation through the next three fiscal years. An initial review of the structure would be appropriate by fiscal year 2026, and then subsequent reviews annually. Review of the structures should take into consideration both internal and external conditions.

The distribution of individual salaries, both by salary level and position within salary level, should be regularly examined to determine whether there is sufficient opportunity for continued salary growth.

Since organizational arrangements and position duties and responsibilities may change from time to time, it will be necessary periodically to reevaluate existing positions and evaluate new positions.

It is most important that Melrose regularly audit and review their compensation system to ensure its validity. We believe that Melrose did not do this for some time, and therefore their plans were outdated.

2. Initial Placements for Current Employees

The placement of two or more positions on a certain grade represents a judgment that those positions should be compensated comparably within the grade range provided. The range is like a scale providing the City with

the opportunity to make distinctions between employees (not positions) based upon established criteria, applied consistently. These criteria might include job performance, special abilities, experience, longevity, gender-equity, and/or any other factors determined by the City.

For initial placement of incumbents within the plan, the City should assign employees to be placed at the step closest to but just above their current wage/salary in order to not reduce the pay of any current employee. The City should also realize that this minimum approach may not recognize certain distinguishing factors among employees.

3. Salaries Below Pay Range

If the salary of an employee is below the minimum of the grade range at the time of implementation, every effort should be made to bring it into the range.

4. Salaries Above Pay Range

To maintain morale and a sense of fairness, HRS recommends the City not reduce the compensation level of any current employee. If an employee's current salary falls above the upper limit of the recommended grade range, then the City should maintain the employee's salary above the maximum for the grade until the employee retires or separates from the City. This is called "red-circling" a position. New employees can be hired at the appropriate lower pay rate. HRS recommends a single administrative policy be adopted and subsequently applied in all cases.

5. Consolidate Classification Plan

HRS recommends that the City develop one consolidate classification plan as we have proposed in this report for the non-union positions, the multiple

salary schedules approach based on hire date should be eliminated. One consolidated plan will ensure better internal equity for positions; so the rating point values of grades are the same and consistently applied; and so the pay equity of positions match the requirements of MEPA; and finally the entry pay is similar for those falling on a similar grade. (Currently the City has multiple plans for the non-union.)

6. Vacancies

When a vacancy develops, it is a good time to automatically review the position. This may involve a job analysis and updating the job description and reviewing the market for the particular position. Positions should also be evaluated according to the appropriate rating factors. Point totals should be calculated for each position by adding the point scores from the degree levels achieved under each factor. On the basis of total points, position generally should be assigned to the appropriate salary levels, according to the established salary level point ranges; and also taking into consideration the external market.

7. Salary Plan

HRS has proposed the following:

- Creation of a salary schedule with each grade having a salary range consisting of a minimum and maximum; and series of steps.
- Positioning of the salary structure at the 75th of market.
- Establishment of a competitive salary schedule, particularly for those fields of study that are considered to be in high demand and that may command high salaries in the market (i.e. Finance, Health, Technology, Facilities, etc.).

8. Update and Maintain the Classification and Compensation Plan

The human resource department should maintain and update the compensation and classification plan. This would include the following tasks:

- Conduct regular position reviews to assure positions have current functional job descriptions that are based on job content.
- Conduct job analysis of new positions to assure these positions are properly assigned to a grade.
- Review positions to ensure internal equity in relationship to other City of Melrose classifications.
- Conduct periodic salary surveys to ensure market competitiveness.
- Review MEPA requirements.

9. FLSA Status

HRS also determined the FLSA Status (exempt/non-exempt status) of the positions included in the study. HRS recommends that City of Melrose regularly evaluate the FLSA status with its labor counsel, as case law may cause changes. HRS utilizes the ERI Occupational Assessor to determine FLSA status of positions. The results of the FLSA audit information was provided to Human Resources.

10. Cost-of-Living Increases vs. Step/Range Movement

Here, it is important to distinguish between (1) a cost-of-living increase and (2) a step increase. A cost-of-living increase is intended to recognize and respond to a general rise in the cost of goods and services experienced by the general population. Each year, the City should determine an appropriate cost-of-living adjustment and apply that increase across the entire compensation schedule. A range movement (step increase) addresses the issue of how employees move along the levels within a grade from minimum to maximum, based on performance, longevity, special skill, certification, etc. The compensation plan should consist of two components: (1) the range adjustment factor (RAF); and (2) the movement-increase factor (MIF), which is based on merit step increase. The RAF is the movement of the total salary range, while the MIF is the movement *through* the salary range steps. A salary-range increase consists of the sum of these two components, plus their interaction or compounding result; thus a salary/wage adjustment. It is very important to regularly update the entire compensation structure with a COLA, or it will quickly become outdated, and the City will have difficulty recruiting talent.

11. Performance Appraisal and Merit-Increase.

It was not within the scope of services for HRS to develop a performance appraisal “tool” for the City of Melrose, MA. HRS has a few suggestions, should the town decide to implement a new updated performance system. A *Management by Objectives System* would be an appropriate methodology for employees engaged in high-level managerial, supervisory or professional positions. A *Uniform Performance Criteria System* is the most commonly used methodology and is best suited to positions where employees

consistently perform the same type of work on a fairly regular basis. This format works well for administrative, clerical, laborers, and other non-exempt positions. The City should consider updating its performance appraisal systems and provided the necessary training for employees, supervisory personnel, and department heads.

12. Determination of Individual Wages/Salaries.

What follows are some general implementation and maintenance guidelines.

a) New Employees

Applicants with qualifying experience are normally hired close to the normal starting rate of the new range. Applicants with outstanding qualifications; education, training and experience may be hired at the wage/salary within the range for the position, but normally no higher than the midpoint of the range. In rare cases, for positions that are very difficult to recruit, it may be necessary to hire beyond the mid-point of the pay range.

b) Transfers

Employees transferred to a position at the same level as their present position will normally receive the same salary paid at the time of the transfer.

c) Transfer to a Lower Salary Grade

Employees transferred by necessity (such as reduction in staff), rather than for inadequate performance, should receive their present salary, although this may exceed the maximum for the lower classification.

d) Promotional Increases

If employees are promoted on a “trial” or “acting” basis, the promotional increase may be deferred until they have demonstrated their ability to handle the duties of the higher classification.

In closing, this HRS methodology will be of assistance in furnishing improved tools and guidance to management and human resources. Ensuring that job descriptions, salary and classification plans are regularly reviewed and have valid methodologies will ultimately improve the management of compensation for all positions. The HRS System will provide a framework within which most salary matters can be handled going forward. While both job evaluation and salary surveys attempt to achieve consistency in the pay structure, they use different criteria to evaluate consistency (i.e. internal vs. external comparison). This methodology works at striking a balance between internal and external pay equity.



ATTACHMENTS

POSITION TITLE	Melrose Current		Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Administrative Accounting Assistant (Police) - PT	19.51 21.50		4 5	24.49 31.24	19.00 35.44	25.11 31.20	27.66 35.44
Animal Control Officer - PT	24.47 26.96		4 7	21.68 30.55	14.00 38.84	21.92 30.00	24.43 35.86
Assistant Auditor	36.95 47.49		6 8	31.90 41.62	23.91 60.91	31.05 39.23	34.82 45.36
Assistant City Clerk	31.68 40.71		7 10	29.12 35.88	17.21 55.88	28.46 34.29	33.14 35.33
Assistant City Solicitor	46.21 59.39		3 4	38.89 51.61	17.21 78.53	45.11 52.34	49.73 72.78
Assistant Director - DPW Administration and Finance	52.02 66.84		5 8	38.72 51.18	22.60 62.32	42.66 54.75	45.10 56.50
Assistant Director of IT	36.95 47.49		2 2	41.97 54.80	38.29 59.06	41.97 54.80	43.80 56.93
Assistant Director of Planning and Community Development	31.03 34.19		2 4	43.62 55.51	42.66 58.87	43.62 55.03	44.10 56.11
Assistant Library Director/Head of Technical Services	36.95 47.49		6 7	33.73 43.25	20.34 60.91	34.37 39.93	40.00 49.73
Assistant Parks Superintendent (Benchmark)	not on plan		2 2	30.33 40.58	27.05 45.56	30.33 40.58	31.96 43.07
Assistant to the Director of Inspectional Services	25.93 33.32		4 5	28.67 34.27	19.72 45.08	30.54 36.59	31.95 38.60
Assistant Treasurer	36.95 47.49		9 10	30.82 39.39	17.21 55.88	31.30 38.35	32.08 40.59
Building Systems Supervisor (HVAC Supervisor) - DPW	34.47 37.98		5 5	31.37 42.65	25.84 50.48	32.67 43.11	34.58 48.23
Cemetery Administrator	31.03 34.19		4 5	29.58 39.24	24.75 48.02	29.99 38.05	33.10 45.02
Chief Assessor	48.05 61.74		7 10	41.46 56.78	27.99 74.16	41.67 52.14	45.16 66.12
Chief Financial Officer and City Auditor	68.93 87.69		5 8	50.95 66.72	32.37 78.53	54.35 67.03	55.46 74.13
Chief of Police	contract 63.58		5 8	61.52 81.44	50.53 94.33	59.78 82.82	68.88 88.33
City Clerk	39.52 50.78		3 8	39.92 49.17	37.28 66.39	37.88 47.65	41.24 50.97
City Engineer	45.76 58.80		6 9	43.81 55.47	30.31 68.29	45.21 55.00	48.03 64.37

POSITION TITLE	Melrose Current		Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
City Planner	40.21 44.30		3 4	36.17 49.01	33.15 60.91	34.44 46.91	37.68 52.95
City Solicitor - Labor Counsel	65.03 82.73		4 5	55.14 71.24	29.33 90.19	57.62 73.48	63.84 86.39
Clerk of Committees	30.80 39.58		1 2	35.64 47.87	35.64 49.80	35.64 47.87	35.64 48.83
Council on Aging Coordinator	19.51 21.50		3 4	23.90 25.78	23.15 29.94	24.04 25.95	24.28 28.01
Council on Aging Director	48.05 61.74		8 8	35.88 45.75	22.78 60.91	34.85 42.58	39.85 53.70
Communication and Community Outreach Coordinator	31.63 40.71		3 6	30.70 39.77	21.29 48.02	32.93 41.46	35.41 46.14
Deputy City Engineer	39.52 50.78		3 4	42.03 56.95	37.26 69.69	37.53 54.11	44.42 59.33
Director of Inspectional Services/Building Commissioner	39.52 50.78		7 9	45.12 56.68	41.00 78.53	44.59 53.04	46.08 65.32
Director of Community Development and Planning	48.05 61.74		7 10	45.75 58.72	29.33 86.39	47.26 54.77	49.15 64.92
Chief Information Officer (city and schools) / IT Director	57.87 73.63		5 8	48.79 64.71	44.59 85.11	49.05 65.15	49.76 67.36
Director of Public Works	68.93 87.69		7 10	54.25 70.60	30.31 86.39	54.58 72.10	61.54 79.20
Director of Strategic Initiatives and Communications (Mayor's Office)	48.05 61.74		3 3	46.34 64.71	41.00 82.03	45.64 59.06	49.00 70.54
Energy Efficiency Manager <i>Benchmark</i>	28.47 31.37		2 3	32.10 41.99	29.42 45.01	32.10 41.71	33.44 43.36
Executive Assistant to City Solicitor	28.26 36.31		2 2	31.15 41.39	30.14 41.61	31.15 41.39	31.65 41.50
Executive Director - Melrose Contributory Retirement	44.40 48.91		2 3	40.71 57.97	32.37 70.88	40.71 57.30	44.88 64.09
Executive Director Melrose Memorial Hall	33.88 43.54		3 3	32.94 44.11	31.31 50.48	32.92 44.27	33.75 47.38
Executive Office Manager - Police	26.12 28.79		2 8	30.93 36.10	30.48 41.29	30.93 36.76	31.15 38.72
Event Operations Assistant - Memorial Hall	19.51 21.50		1 1	20.65 28.98	20.65 28.98	20.65 28.98	20.65 28.98

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Facilities Manager - City and Schools	45.76 58.80	4 7	51.19 63.46	44.59 86.39	50.20 59.92	55.88 68.50
Finance Manager (Auditing)	28.26 36.31	2 3	31.08 40.28	30.32 46.51	31.08 39.80	31.46 43.15
Finance Administrator - Fire Dept./Public Safety	25.67 32.99	3 3	28.31 36.27	27.30 37.93	28.74 35.44	28.81 36.68
Financial Systems Analyst/Project Manager (Auditor/IT Depts.)	39.52 50.78	4 4	43.88 57.46	31.37 68.47	46.54 57.85	50.58 62.49
Fire Chief	contract 66.27	5 8	59.39 73.94	50.53 86.39	59.78 73.87	64.96 77.58
Health Director (Melrose is regional)	61.35 78.05	6 7	36.18 47.13	23.91 59.06	36.84 46.16	39.97 53.78
Human Resources Assistant	28.47 31.37	1 2	26.44 35.63	26.44 36.27	26.44 35.63	26.44 35.95
Human Resources Director	48.05 61.74	7 10	41.82 54.86	26.71 70.88	41.67 52.30	46.82 63.17
Human Resources Benefits Coordinator	36.95 47.49	7 10	29.58 37.29	17.21 50.48	29.31 37.16	32.69 39.37
Library Director	36.59 47.02	7 10	43.20 54.50	25.35 78.53	44.59 51.81	48.06 61.83
Local Building Inspector (Certified)	40.21 44.30	4 7	33.38 40.21	31.31 50.48	33.81 40.39	34.15 42.71
Milano Center Manager (COA)	31.03 34.19	1 1	41.25 54.84	41.25 54.84	41.25 54.84	41.25 54.84
Operations Manager - DPW	39.52 50.78	4 6	42.75 51.68	39.02 58.09	43.08 51.66	44.09 56.60
Program Coordinator - MA in MotionZBA Clerk	28.47 31.37	1 1	25.38 34.09	25.38 34.09	25.38 34.09	25.38 34.09
Planning Coordinator & ZBA Clerk	24.47 26.96	3 3	23.12 29.85	18.65 34.15	22.25 30.25	25.36 32.20
Plumbing and Gas Inspector	28.47 31.37	5 7	28.83 37.37	19.95 48.02	28.46 36.23	32.93 43.49
Public Health Specialist	34.47 37.98	2 2	35.90 47.88	33.61 52.27	35.90 47.88	37.05 50.07
Program Coordinator - Tobacco/Alcohol	26.12 28.78	1 1	34.25 46.91	34.25 46.91	34.25 46.91	34.25 46.91
Project Engineer	28.26 36.31	4 6	34.67 43.86	31.68 53.61	35.35 43.05	36.27 46.60
Recreation Coordinator	26.12 28.78	7 8	25.39 31.81	17.21 48.02	24.52 28.60	28.84 33.94

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Recreation Director	45.76 58.80	7 9	38.00 48.96	26.71 70.88	37.77 44.90	41.29 53.07
Sealer of Weights and Measures	31.92 35.17	2 3	31.85 42.74	30.77 48.02	31.85 40.39	32.39 44.20
Senior Planner	40.21 44.30	5 7	33.29 43.64	28.01 51.27	34.43 45.01	34.78 50.19
Superintendent of Mount Hood - <i>Limited Data</i>	45.76 58.80	2 2	34.74 47.56	25.66 60.47	34.74 47.56	39.27 54.01
Superintendent of Parks	not on plan 29.12	4 5	35.20 41.90	26.71 49.77	36.21 39.80	39.53 45.02
Sustainability Manager	28.26 36.31	2 2	36.09 51.34	34.64 55.88	36.09 51.34	36.81 53.61
Systems Analyst IT (city/schools) - networks/databases	30.80 39.58	3 5	40.97 50.99	34.43 55.19	42.66 51.27	44.24 55.00
Treasurer/Collector	48.05 61.74	7 9	43.83 58.05	23.91 78.53	45.27 56.17	48.84 66.39
Veteran's Administrative Assistant/PT	19.51 21.50	1 2	31.74 36.34	31.74 42.56	31.74 36.34	31.74 39.45
Veterans Services Director (Regional Position)	39.81 43.87	6 7	28.35 37.02	19.95 47.14	28.23 36.23	31.23 42.93
Water-Sewer Administrator (Billing)	30.80 39.58	3 5	24.94 35.04	21.29 40.39	23.75 36.59	26.77 39.37
Wiring Inspector	31.92 35.17	6 8	30.87 40.27	19.95 48.02	30.70 41.93	34.32 46.41

POSITION TITLE	Melrose Current		Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
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ADDITIONAL BENCHMARK DATA

Assistant Health Director		3	32.23	29.58	33.51	33.56
		3	42.27	43.49	42.16	42.82
Director - E-911		1	32.87	32.87	32.87	32.87
		1	45.59	45.59	45.59	45.59
Dispatch Center Manager		4	26.63	22.27	26.72	28.57
		5	33.24	39.85	30.93	34.97
Dispatcher/Communicator		6	22.56	20.55	21.68	22.78
		6	27.80	36.23	26.48	28.00
Diversity, Equity and Inclusion Director/Coordinator		3	42.41	36.00	37.28	45.61
		3	58.97	82.11	48.22	65.17
Emergency Management Director		1	40.13	40.13	40.13	40.13
		1	45.34	45.34	45.34	45.34
Health and Human Services Director		3	51.93	49.62	51.82	53.08
		5	64.00	78.53	65.32	70.92
Help Desk Technician		4	30.23	28.05	29.63	31.51
		5	37.64	45.02	35.82	39.85
Mental Health Clinician		3	25.60	21.46	25.46	27.67
		3	36.04	43.61	32.94	38.27
Parks Grounds Laborer (Pine Banks)		4	20.94	17.46	20.31	23.10
		4	24.80	29.90	23.42	25.39
Park Ranger		1	24.03	24.03	24.03	24.03
		1	29.96	29.96	29.96	29.96
Purchasing Director/Coordinator		5	34.52	23.91	34.58	37.28
		6	44.89	55.19	48.61	50.11
Social Worker		3	30.88	22.73	33.61	34.96
		3	43.37	53.61	43.49	48.55

SALARY ASSESSOR®

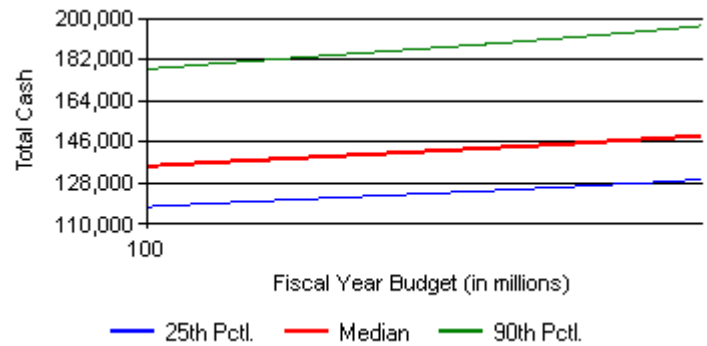
Individual Job Report

Police Chief

Specifications

Prepared For: City of Melrose, MA
Area: Massachusetts - Commonwealth Average
Industry: Government - City Support Services
Industry Codes: eSIC: 9104, NAICS: 921100, usSEC: 9721
Organization Size: 400,000,000
Education Adjustment:
Skill Adjustment:
Certification Adjustment:
Annualized Salary Trend: 2.6% (Adjustment: 0.21%)
Planning Date: 2/6/2022
Database as of: 1/1/2022
eDot: N/A
SOC: N/A
Printout Date: 2/6/2022
(Items in bold affect salary estimates)

Annual Total Cash Graph



Estimated Survey Median Annual Total Cash

All Incumbent Median: \$148,695

Fiscal Year Budget	25th Percentile	45th Percentile	Median	75th Percentile	90th Percentile
400,000,000	129,379	145,333	148,695	173,738	196,680
200,000,000	123,194	138,462	141,757	165,331	186,740
100,000,000	117,513	132,114	135,290	157,868	177,787

The Police Chief in Melrose is a contract position; therefore HRS has not placed this position on the compensation and classification plan, as the contract would prevail. Instead, HRS has provided pay range data for police chiefs in the custom market survey. However, we determined it was necessary to look at statewide composite actual rates data from municipal communities in order to discern better what police chiefs are making in 2022. The range is \$157,868 to \$173,738 at the 75th percentile. The all incumbent average is \$148,695. This is hybrid data through ERI.

Attachment: MF Attachments Sent 11.3 (ORDER-2023-31 : An Appropriation to fund the Local 272 Laborers Contract)

SALARY ASSESSOR®

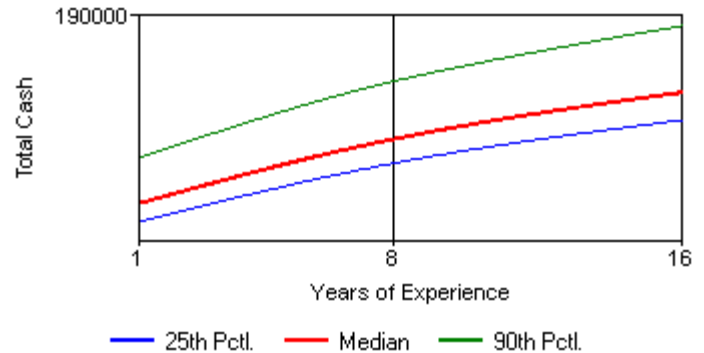
Individual Job Report

Fire Chief

Specifications

Prepared For: City of Melrose, MA
 Area: Massachusetts - Commonwealth
 Average
 Industry: Government - City Support Services
 Industry Codes: eSIC: 0000, NAICS: 000000, usSEC: 0000
 Organization Size: (Data reported by years of experience)
 Education Adjustment:
 Skill Adjustment:
 Certification Adjustment:
 Annualized Salary Trend: 2.6% (Adjustment: 0.21%)
 Planning Date: 2/6/2022
 Database as of: 1/1/2022
 eDot: N/A
 SOC: N/A
 Printout Date: 2/6/2022
 (Items in bold affect salary estimates)

Annual Total Cash Graph



Estimated Survey Median Annual Total Cash

All Incumbent Median: \$129,224

Years of Experience	25th Percentile	45th Percentile	Median	75th Percentile	90th Percentile
15	136,233	147,128	149,591	166,333	181,340
10	123,644	133,661	135,968	151,767	164,981
5	106,310	115,034	117,078	130,950	142,987

The Fire Chief in Melrose is a contract position; therefore HRS has not placed this position on the compensation and classification plan, as the contract would prevail. Instead, HRS has provided pay range data for fire chiefs in the custom market survey. However, we determined it was necessary to look at statewide composite actual rates data from municipal communities in order to discern better what fire chiefs are making in 2022. The range is \$130,950 to \$166,333 at the 75th percentile. The all incumbent average is \$129,224. This hybrid data through ERI.

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Clerk of Committees	City Council	61,151.00		600.00			61,751.00	64,461.25	3,310.25	5.4%	30.80	39.58	11	34.75	4
							-	-	-						
Communication and Community Outreach Coordinator	Mayor	65,703.00		650.00			66,353.00	70,953.75	5,250.75	8.0%	34.22	43.97	12	38.25	4
Director of Strategic Initiatives and Communications	Mayor	96,896.00		650.00			97,546.00	101,802.40	4,906.40	5.1%	48.41	53.33	19	54.88	6
Director of Economic Recovery and Business Development	Mayor	92,230.60		650.00			92,880.60	93,343.60	1,113.00	1.2%	48.05	61.74	15	44.68	5
							-	-	-						
CFO/City Auditor	Auditor	157,172.00	1,175.00	600.00	3,000.00		161,947.00	159,956.65	2,784.65	1.8%	68.93	87.69	23	75.07	8
Assistant City Auditor	Auditor	95,350.00	775.00	600.00			96,725.00	97,925.45	2,575.45	2.7%	36.95	47.49	18	52.79	6
Finance Manager	Auditor	71,481.00	775.00	600.00			72,856.00	72,604.70	1,123.70	1.6%	28.26	36.31	11	34.75	4
							-	-	-						
Chief Assessor	Assessor	93,204.00	775.00	600.00	4,347.00		98,926.00	101,802.40	8,598.40	9.2%	48.41	53.33	19	54.88	6
							-	-	-						
Treasurer/Collector	Treasurer	114,308.00		600.00	1,000.00		115,908.00	114,639.00	331.00	0.3%	48.05	61.74	19	54.88	6
Assistant Treasurer	Treasurer	77,590.00		600.00			78,190.00	77,590.00	-	0.0%	36.95	47.49	13	40.80	4
							-	-	-						
Exec. Assistant to City Solicitor	Legal	68,707.00	975.00	600.00	6,500.00	3,000.00	79,782.00	70,100.45	1,393.45	2.0%	28.26	36.31	10	31.62	3
City Solicitor - Labor Counsel	Legal	134,354.00		600.00			134,954.00	139,254.85	4,900.85	3.6%	65.03	82.73	23	75.07	8
Assistant City Solicitor	Legal	110,158.00	775.00	600.00			111,533.00	111,225.80	1,067.80	1.0%	46.21	59.38	20	57.63	6
							-	-	-						
Human Resources and Labor Relations Director	HR	107,383.00	975.00	600.00			108,958.00	116,846.45	9,463.45	8.8%	48.05	61.74	21	62.99	7
Human Resources and Benefits Coordinator	HR	74,818.00		600.00			75,418.00	75,684.00	866.00	1.2%	36.95	47.49	13	40.80	4
Human Resources Assistant	HR	54,374.00		600.00			54,974.00	55,265.00	891.00	1.6%	28.47	31.37	9	27.54	3
							-	-	-						
Director of IT City & Schools	IT	144,943.00	775.00	600.00			146,318.00	144,943.00	-	0.0%	57.87	73.63	21	62.99	7
IT Systems Analyst	IT	74,890.00	775.00	600.00			76,265.00	76,459.00	1,569.00	2.1%	30.80	39.58	13	40.80	4
Assistant IT Director	IT	93,480.00	775.00	600.00			94,855.00	94,493.70	1,013.70	1.1%	36.95	47.49	16	48.96	5
Financial Systems Analyst/Project Manager	IT	84,884.00	620.00	600.00			86,104.00	86,517.20	1,633.20	1.9%	39.52	50.78	17	50.75	6
Project/System Administrator	IT	69,101.00		600.00			69,701.00	81,935.35	12,834.35	18.6%	34.22	43.97	13	40.80	4
							-	-	-						
City Clerk	City Clerk	90,807.00	775.00	600.00	1,500.00	4,000.00	97,682.00	90,820.80	13.80	0.0%	39.52	50.78	16	48.96	5
Assistant City Clerk	City Clerk	70,158.00		600.00			70,758.00	70,158.00	-	0.0%	31.68	40.71	11	34.75	4
							-	-	-						
Senior Planner	Planning	78,348.00	775.00	600.00			79,723.00	80,321.50	1,973.50	2.5%	40.21	44.30	13	40.80	4
Director of Community Development and Planning	Planning	131,537.00	1,530.00	600.00			133,667.00	131,537.00	-	0.0%	48.05	61.74	19	54.88	6
Sustainability Manager	Planning	72,911.00	975.00	600.00			74,486.00	75,684.00	2,773.00	3.8%	28.26	36.31	13	40.80	4
							-	-	-						
Admin. Accounting Assistant	Police	19,561.00					19,561.00	19,949.00	388.00	2.0%	19.51	21.50	8	20.91	2
Executive Office Manager Police	Police	55,541.00	775.00	600.00			56,916.00	64,810.20	9,269.20	16.7%	26.12	28.79	10	31.62	3

Attachment: MF Attachments Sent 11.3 (ORDER-2023-31 : An Appropriation to fund the Local 272

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Chief	Police	145,988.00			3,000.00			145,988.00	-	0.0%					
							-		-						
Chief	Fire	142,803.00	2,500.00	600.00			145,903.00	153,888.00	11,085.00	7.8%					
Finance Administrator - Fire Dept	Fire	50,816.00		600.00			51,416.00	57,548.40	6,732.40	13.2%	26.12	28.78	10	31.62	3
Emergency Management Director	Emergency Management	28,620.00					28,620.00	36,490.50	7,870.50	27.5%			12	38.25	4
							-		-						
Assistant to the Director of Inspectional Services	Inspectional Services	61,457.00		600.00			62,057.00	61,457.00	-	0.0%	25.93	33.32	10	31.62	3
Director of Inspectional Services/Building Commissioner	Inspectional Services	105,190.00		600.00			105,790.00	105,190.00	-	0.0%	39.52	50.78	19	54.88	6
Sealer of Weights & Measures/Wire Inspector	Inspectional Services	49,629.00		410.00			50,039.00	56,763.00	7,134.00	14.4%	31.92	35.17	12	38.25	4
Plumbing and Gas Inspector	Inspectional Services	45,058.00		410.00			45,468.00	48,654.00	3,596.00	8.0%	28.47	31.37	12	38.25	4
Local Building Inspector	Inspectional Services	64,452.00		600.00			65,052.00	65,206.96	754.96	1.2%	40.21	44.30	12	38.25	4
							-		-						
Project Engineer	DPW-Admin	65,269.00		600.00			65,869.00	81,090.00	15,821.00	24.2%	28.26	36.31	12	38.25	4
Operations Manager	DPW-Admin	109,201.20	975.00	600.00			110,776.20	111,914.80	2,713.60	2.5%	51.51	66.19	18	52.79	6
City Engineer	DPW-Admin	112,853.00	-	600.00	1,000.00		114,453.00	116,345.60	3,492.60	3.1%	45.76	58.80	19	54.88	6
DPW Director	DPW-Admin	143,014.00	775.00	600.00	1,000.00		145,389.00	142,037.35	(976.65)	-0.7%	68.93	87.69	23	75.07	8
Building Systems Supervisor (HVAC)	DPW-Admin	83,775.00	775.00	600.00			85,150.00	86,496.00	2,721.00	3.2%	34.47	37.98	13	40.80	4
Facilities Manager (City & School)	DPW-Admin	111,794.00		600.00	1,000.00		113,394.00	111,914.80	120.80	0.1%	45.76	58.80	18	52.79	6
Assistant Director DPW Administration and Finance	DPW-Admin	119,936.00		600.00			120,536.00	123,677.60	3,741.60	3.1%	52.02	66.84	19	54.88	6
Deputy City Engineer	DPW-Admin	100,831.00	-	600.00			101,431.00	107,590.00	6,759.00	6.7%	39.52	50.78	17	50.75	6
Cemetery Administrator	DPW-Admin	48,078.00	554.00	429.00			49,061.00	50,681.25	2,603.25	5.4%	31.03	34.19	12	38.25	4
							-		-						
Health Director (regional)*	Health	116,936.00		600.00			117,536.00	150,000.00	33,064.00	28.3%	61.35	78.05	19*	54.88	6
Public Health Specialist	Health	67,615.00		600.00			68,215.00	67,615.00	-	0.0%	34.47	37.98	11	34.75	4
Animal Control Officer	Health	25,686.00		-			25,686.00	25,686.00	-	0.0%	24.47	26.96	9	27.54	3
Program Coordinator - Tobacco/Alcohol	Health	65,538.21	775.00	600.00			66,913.21	65,741.20	202.99	0.3%	26.12	28.78	9	27.54	3
Prevention and Wellness Program Coordinator	Health	56,191.71	666.50	516.00			57,374.21	52,326.90	(3,864.81)	-6.9%	34.47	37.98	9	27.54	3
							-		-						
Milano Center Manager (COA)	COA	58,287.00		600.00			58,887.00	58,695.00	408.00	0.7%	31.03	34.19	10	31.62	3
Council on Aging Director	COA	90,921.00		600.00			91,521.00	97,925.45	7,004.45	7.7%	48.41	53.33	18	52.79	6
							-		-						
Veterans Service Director (Regional)	Veterans	78,448.00		600.00			79,048.00	79,468.20	1,020.20	1.3%	39.81	43.87	14	42.84	5

Attachment: MF Attachments Sent 11.3 (ORDER-2023-31 : An Appropriation to fund the Local 272

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Administrative Assistant PT	Veterans	19,546.00					19,546.00	19,948.00	402.00	2.1%	19.51	21.50	8	20.91	2
							-		-						
Library Director	Library	99,296.00	1,530.00	600.00			101,426.00	108,035.20	8,739.20	8.8%	36.59	47.02	19	54.88	6
Assistant Library Director (Head Technical Services)	Library	84,266.00	2,500.00	600.00			87,366.00	85,237.25	971.25	1.2%	36.95	47.49	13	40.80	4
							-		-						
Recreation Director	Recreation	99,079.00	975.00	600.00			100,654.00	97,944.00	(1,135.00)	-1.1%	45.76	58.80	17	50.75	6
Recreation Coordinator	Recreation	48,454.00		600.00			49,054.00	53,145.75	4,691.75	9.7%	26.12	28.78	9	27.54	3
Executive Director Melrose Memorial Hall	Memorial Hall	87,418.00	975.00	600.00			88,993.00	90,820.80	3,402.80	3.9%	33.88	43.54	16	48.96	5
Events Operation Manager Memorial Hall	Memorial Hall	18,824.00					18,824.00	19,948.14	1,124.14	6.0%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	20,335.00					20,335.00	20,521.90	186.90	0.9%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	18,776.00					18,776.00	19,571.76	795.76	4.2%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	5,255.00					5,255.00	5,541.15	286.15	5.4%	19.51	21.50	8	20.91	2
							-		-						
Water-Sewer Administrator Billing	Sewer	73,422.00	775.00	600.00			74,797.00	75,313.00	1,891.00	2.6%	30.80	39.58	12	38.25	4
									-						
Superintendent of Parks	Mt Hood/Parks	99,080.00	1,175.00	600.00			100,855.00	97,944.00	(1,136.00)	-1.1%	45.76	58.80	17	50.75	6
							-		-						
Executive Director - Melrose Contributory Retirement	Retirement	121,178.14	775.00	600.00			122,553.14	117,031.95	(4,146.19)	-3.4%	44.40	48.91	18	52.79	6
							-								
							Total Adjustment		217,034.75						

1. Fiscal 2023 is based on a 53 week Payroll Budget.
2. Please note this chart was prepared to demonstrate total compensation for employees **inclusive of** longevity, potential SLBB and Stipends and to show the proposed monetary change by position.
3. The funding request of \$167,309.63 Council Order 2023-29 represents the budgetary impact of these adjustments **and takes into consideration any departmental changes since the budget was approved in June 2022.**
(such changes are due to regionalization pending Council approval, staffing changes, vacancies, temporary out of grade assignments to cover for leaves)
4. The funding order doesn't reflect the total adjustment since certain positions are funded through ARPA, grants, regional budgets and other sources and they have absorbed a portion of the adjustment.
5. The Health Director proposed grade is representative of the proposed salary prior to the regionalization with Stoneham, which is pending approval of Council.
6. 21 of the positions have outgrown the current salary schedule and receive only COLA, without any steps.
7. Few positions have a base salary that is higher than the proposed hourly maximum, their salary will not be reduced, and will only be eligible for COLA going forward.
8. A negative percent adjustment reflects a slower salary progression than the current plan.
9. Report produced 11/3/22 by the Auditor and HR depts.

Questions Received from Councilors regarding Compensation Study and CBA Orders

1. Provide a 10-year history of all approved withdrawals from the contract stabilization account and indication of what was approved (e.g., in X year the council approved Y amount to go toward funding retro raises for Z collective bargaining agreement).

Please see attached Stabilization History.

2. Provide a copy of the compensation study completed by the consultant any related documents-Please see attached Compensation and Classification plan documents.

3. Provide a list of any identified non-union positions that are currently identified for a compensation adjustment under order 2023-29 to maintain compliance with the MA Equal Pay Act.

The Mass Equal Pay Act requires that employees performing equal or comparable work are compensated equally. "Equal work" involves similar skill and responsibilities and is performed in similar working conditions. The methodology HRS used involves the components required by MEPA and by creating one consolidated compensation plan and a classification plan it ensures that the pay equity matches the MEPA requirements. It is hard to isolate which positions require adjustments solely related to MEPA compliance. The Comp and Class study HRS conducted is different from a pay equity study, disparity study or gender analysis, all of which involve a deeper analysis of compliance with the Mass Equal Pay Act. The Comp and Class study focuses on the positions themselves not the employees in the positions, which is what a pay equity study does, as it takes into consideration the individual longevity, personal qualifications, the education/ training and the performance of the individual employees. The Comp and Class study has built the elements of MEPA into its methodology, job analysis, job evaluation, along with external market analysis, which sets the foundation of a system that is externally and internally equitable.

4. List of all positions by job title and department slated to be adjusted under the 2023-29 funding request. For these positions, total current annual compensation, inclusive of stipends, COLAs, and any other monetary compensation paid out of all City funds (operating and enterprise).

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22".

5. Orders 2023-30 and 2023-31 reference that the funding request is for FY 23 funding for a union contract.

- When was this contract settled?

The MOUs were executed September 23, 2022 (Clerical) and October 4, 2022 (Laborers).

- Are these raises retro to the start of the fiscal year?

The previous contracts expired at the end of FY22. The new contracts are effective with the start of FY23, therefore the budgeted raises are retro to the start of the fiscal year.

- Were any of these raises budgeted for in the current FY 23 budget, or is the totality of the increases being absorbed through the stabilization and retained earnings fund?

As is the customary budgeted practice, any FY23 step increases were budgeted based on the old contract, which was the known amount when FY23 budget was set. The stabilization fund absorbs only partially increases.

6. What is the stated purpose for the contract stabilization, water retained earnings, and sewer retained earnings funds? Is this stated purpose set by: state statute/charter/city admin/all of the above? The "Contractual Obligations and Salary & Wages Stabilization Fund" was established in 2006 by Council Vote 06-221 and in accordance with MGL Chapter 40, Section 5B. Water Retained Earnings and Sewer retained earnings were established under MGL Chapter 44, Section 53F ½ for Enterprise Funds.

7. What is the City relying on to justify paying non-union comp adjustments from the contract stabilization fund?

The stabilization fund was created for the purposes of contractual obligations as well as salary and wages. The adjustments resulting from the Comp and Class study are one-time non-budgeted salary adjustments, therefore the stabilization fund is used to fund part of these adjustments.

8. Did the classification review the compensation for both full time and part time employees? Among the positions reviewed we have both full time and part time employees.

9. Can you provide what positions have other compensation and what are the "Other" items? Under "other compensation" we consider stipends, longevity, sick leave incentives.

Below are the positions receiving a stipend (see list below, amount of stipend and reason for it).

Position	Stipend Position	Stipend Amount
Exec. Legal Assistant	Liquor Commission	\$6,500.00
Exec. Legal Assistant	Retirement Board	\$3,000.00
CFO/Auditor	Retirement Board	\$3,000.00
City Clerk	Clerk/City Council	\$4,000.00
City Clerk	Board of Registrars	\$1,500.00
Police Chief	Retirement Board	\$3,000.00
Assessor	Board of Assessor	\$4,347.00
Treasurer	Retirement Board (working with)	\$1,000.00
DPW Director	job specific licenses	\$1,000.00
Deputy City Engineer	job specific licenses	\$1,000.00
City Engineer	job specific licenses	\$1,000.00

Longevity is an annual bonus that benefit eligible non-union employees receive based on continuous years of service with the City, following the schedule below:

Years of Continuous Service	Annual Lump Sum Compensation
5 years, but less than ten 10 years	\$ 775.00
10 years, but less than 15 years	\$ 975.00
15 years, but less than 20 years	\$ 1,175.00
20 years, but less than 25 years	\$1,530.00
25 years, but less than 29 years	\$1,950.00
29 years or more	\$2,500.00

Non-union benefit eligible employees are reimbursed earned unused sick time in accordance with the schedule below. The maximum reimbursement they are eligible for per year is \$650.

If employee uses:	Less than 24.9% of available sick days (0 to 2.9 days/0 to 20.9 hours)	Receives \$50.00/day for remaining unused days
	between 25% - 49.9% of available sick days (3 to 5.9 days/21 to 41.9 hours)	Receives \$40.00/day for remaining unused days
	between 50% -74.9% of available sick days (6 to 8.9 days/42 to 62.9 hours)	Receives \$30.00/day for remaining unused days.
	75% or more (9 to 12 days/63 to 84 hours)	Zero reimbursement
In all instances, the applicable percentages shall be rounded down.		

10. Please provide by position side by side the old min and max salary and the new min and max salary.

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22"

11. Please provide by position the dollar increase along with the percentage.

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22"

12. You state in your memo that periodically we should do a cost of living increase in the compensation structure. How do you define periodically?

This is a discretionary decision of the Mayor and the CFO. Depending on the economy, employers are advised to apply COLA to their compensation plan to ensure that the pay is still appropriate, competitive with the changing economy and not stagnant. Union employees have COLA applied to the comp plans every year.

13. If an employee is above the range how will their annually compensation work every year?
They will only receive COLA going forward.

14. Are there any collective bargaining units within the City (including those under MPS) that are not eligible to access the contract stabilization fund? If so, why? There are no CBAs that are restricted from using the Contractual Obligations and Salary & Wages Stabilization Fund.

Ghobrial, Andrew

From: Maryandjoe Pelrine <[REDACTED]>
Sent: Monday, November 7, 2022 10:20 AM
To: City Council
Subject: Tonights meeting

Good Morning All,
 What a beautiful day!
 I am not sure if I can attend tonight.
 On these orders

2023-29 funding for HRS compensation study. I thought that this study was completed already.
 Why is a total of \$ 7534.00 coming out of W & S retained earnings to pay for this?

2023-30 Funding for the clerical union contractual This time W & S retained earnings is being
 tapped for \$ 8792.00. Why wouldn't this line be covered entirely by the contract stabilization account?

2023-31 Funding for the labor's union contract. This time the W & S retained earning is being
 tapped for \$ 18,294.00. Again why isn't the contract stabilization account covering all of this?

Total \$ 34,620.00 is a lot of money.
 How did the city come to these percentage totals for each of these items?

It would seem to me that when the budget was approved, each of these line lines were accounted
 for, and funded, and now more money needs to be allocated?

With all of our water bills through the ceiling, How is that there \$34,620.00 in these retained earning
 accounts? Are we being charged to much for W & S?
 What are retained earning accounts?

Thanks for all you do for the City of Melrose.

Joe

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 determined that email is a public record unless the content of the email falls within one of the stated exemptions under
 the Massachusetts Public Records Laws.****

Attachment: Pelrine_Redacted (ORDER-2023-31 : An Appropriation to fund the Local 272 Laborers Contract)

Ghobrial, Andrew

From: Eugenia Gibbons <[REDACTED]@com>
Sent: Monday, November 7, 2022 5:54 PM
To: Cinella, Christopher; Jamaledine, Maya; Migliorelli, Leila; Eccles, Jack; Karamcheti, Manjula; Williams, Ryan; Stewart, Robert; Obremski, John; Garipay, Mark; MacMaster, Shawn; Grigoraitis, Jennifer
Cc: Ghobrial, Andrew; *Mayor Brodeur; Withey, Dorie; O'Connell, Ed; McAndrew, Jennifer; DeSelm, Lizbeth; Razi-Thomas, Jennifer; Driscoll, Margaret
Subject: Public Comment - 11/7 Appropriations Committee Meeting

I request that these comments be read at the meeting so they may be included in tonight's public record.

Dear esteemed members Melrose City Council,

I was hoping to attend this evening's appropriations committee meeting, but work obligations prevent me from doing so. And so I am sharing with the full committee concerns about tonight's agenda items that I have already expressed to my ward councilor, Ryan Williams.

Of particular concern are requested approvals for a salary study and pay raises for certain city personnel funded from a contract stabilization account.

Even if this is standard practice or perfunctory in nature, it is perplexing why such a request would be made at a time when the district has yet to resolve contract negotiations with teachers/paras, the FY23 school department budget is being reconstructed, and questions remain about the extent to which the city will need to modify its anticipated contribution to make the current (and potentially FY24) budget whole.

Given that the school budget is a significant portion of the city budget it stands to reason that the city budget, including a \$1M + reserve sitting in the contract stabilization fund, is also in need of thorough review.

Without question, staff deserve raises. And any suggestion to hold this question until further review is NOT a commentary on the merits of well-deserved salary increases for essential city personnel. Rather, it is a request that such allocations are accurately accounted for in the budget alongside and not at the expense of other city and district obligations, like teachers, student resources, or other unforeseen expenditures.

Shortsighted maneuvers like this contribute to the structural issues that have been in sharp focus in recent weeks.

Assuming these items are taken up this evening, it would be prudent for the requests to be held in committee until the city and the district are able to provide clarity and further insight into the status of the FY23 budget and a timeline for when the contract with teachers will be resolved - actions that will also help to restore public trust.

I strongly urge you to consider this and hold these items until resolution has been met on a contract and the budget.

Thank you for your service and for your time and consideration.

Sincerely,
 Eugenia Gibbons
 Ward 7 Resident

CC: Mayor Brodeur & Members of Melrose School Committee

Attachment: Gibbons_Redacted (ORDER-2023-31 : An Appropriation to fund the Local 272 Laborers Contract)

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Attachment: Gibbons_Redacted (ORDER-2023-31 : An Appropriation to fund the Local 272 Laborers Contract)



CITY OF MELROSE

Human Resources Department

Polina Latta
 Director
 Platta@cityofmelrose.org

City Hall, 562 Main Street
 Melrose, Massachusetts 02176
 (P) 781-979-4146
 (F) 781-979-4246

To: President Chris Cinella
 Melrose City Council

From: Polina Latta, Human Resources Director

Re: Compensation and Classification Study

Date: October 12, 2022

In FY22 the City of Melrose hired a Human Resources Services, Inc. (HRS) to perform a comprehensive classification and compensation study of approximately 70 non-union positions including department heads and staff, which has not been done since 1988. The goal of this initiative was to invest in the City's role as an employer, and modernize and standardize our pay practices for non-union Managers and staff to provide for meaningful progression and promotion while ensuring compliance with the Fair Labor Standards Act and the Mass Pay Equity Act.

The study involved updating the job descriptions, classifying positions according to a uniform point analysis standard, surveying the market of comparable municipalities as needed to determine representative rates of compensation, and developing and recommending a new compensation and classification system for the non-union group of positions.

Based on internal and external equity, the study recommended replacing the current multiple non-union plans with one consolidated compensation and classification plan for the non-union positions. The proposed pay plan supports pay equity and hierarchy based on skill and job requirements. It consists of 23 pay grades and ten steps in each grade with minimum and maximum salary and 2% between steps. HRS recommended continuing the policy on pay steps for easier maintenance and consistency of the plan. The pay ranges targeted the 75th percentile of market, which was necessary in order to remain competitive as compared to other municipalities in Massachusetts.

This is a base salary plan and does not include compensation for stipends, cost-of living, benefits, or other compensation. For initial placement of employees within the plan, the City used the approach of placing at the step closest to but just above their current wage in order to not

reduce the pay of any current employee. For employees whose salary was below the minimum of the pay range efforts were made to bring it into the range. To maintain fairness, it was recommended that should an employee salary fall above the upper limit of the range the City should maintain that salary and not reduce it.

The proposed pay structure is designed to provide appropriate compensation through the next three fiscal years. As position duties and responsibilities change over time or as new positions emerge, the consultant has furnished a tool to evaluate and measure the position against a common set of criteria in a systematic and objective manner to rank the job in the appropriate grade of the compensation structure.

In order to ensure that pay levels remain equitable and competitive the City was advised to maintain the current plan by applying cost-of-living increase across the entire compensation structure periodically, as determined by the administration, or the new compensation structure will become outdated, and the City will have difficulty recruiting talent, as we have witnessed in the past.

Therefore, we are requesting an appropriation in the amount of \$167,310 (One Hundred Sixty-Seven thousand, three hundred and ten dollars) to fund the HRS compensation study. The requested appropriation is from the following accounts \$159,784 from the Contract Stabilization fund (84042-590000), \$3,763 from Sewer, Reserve for Retained Earnings (84152-590000) and \$3,763 from Water, Reserve for Retained Earnings (84162-590000) to various salary and wage lines as set forth herein.

Ghobrial, Andrew

From: Golden, Kerriann
Sent: Friday, October 28, 2022 12:42 PM
To: Grigoraitis, Jennifer
Cc: Dello Russo, Patrick; Phillips, Shannon; Latta, Polina; Ghobrial, Andrew; Cinella, Christopher
Subject: RE: Request for additional documentation for orders 2023-29, 2023-30, 2023-31
Attachments: 8404ContractStabilizationHistory.pdf; 2006-221 Creation of Contractual Obligations S&W Stabilization Fund.pdf

Good Morning Councilor Grigoraitis,

Patrick and I are providing the information for the questions below that are relevant to our piece. Attached please find a 10 year history of the Contract Stabilization Fund. This fund was established by the Council Order attached 06-221.

-Contract Stabilization was established by Council Vote 06-221 and in accordance with MGL Chapter 40, Section 5B.
 -Water Retained Earnings and Sewer retained earnings were established under MGL Chapter 44, Section 53F ½ for Enterprise Funds.

There are no CBAs that are restricted from using the Contractual Obligations and Salary & Wages Stabilization Fund.

For orders 2023-30 and 2023-31- Yes, these raises will be retro to the start of Fiscal Year 2023. For the FY 2023 budget, Steps and longevity changes were budgeted. Appropriation Orders 2023-30 and 2023-31 represent the COLA negotiated with both Local 272 Clerical and Local 272 Laborers.

Thanks
 Kerri
 Assistant City Auditor
 City of Melrose
 562 Main Street
 Melrose, MA 02176

From: Grigoraitis, Jennifer <jgrigoraitis@CityofMelrose.org>
Sent: Monday, October 24, 2022 11:27 AM
To: Latta, Polina <platta@CityofMelrose.org>; Dello Russo, Patrick <PDelloRusso@CityofMelrose.org>; Phillips, Shannon <sphillips@CityofMelrose.org>
Cc: Ghobrial, Andrew <aghobrial@CityofMelrose.org>; Cinella, Christopher <ccinella@CityofMelrose.org>
Subject: Request for additional documentation for orders 2023-29, 2023-30, 2023-31

Good morning,

My understanding is that some combination of the three of you will be before the Appropriations & Oversight Comm to speak to these three orders. In advance of that meeting (which I know Andrew is working to get scheduled), I would like to receive the following additional information:

Attachment: Request for additional documentation for orders 2023-29, 2023-30, 2023-31 (ORDER-2023-29 : An Appropriation from Contract

- ten-year history of all approved withdrawals from the contract stabilization account and indication of what was approved (e.g., in X year the council approved Y amount to go toward funding retro raises for Z collective bargaining agreement)
- Copy of the compensation study completed by the consultant any any related documents
- A list of any identified non-union positions that are currently identified for a compensation adjustment under order 2023-29 to maintain compliance with the MA Equal Pay Act
- List of all positions by job title and department slated to be adjusted under the 2023-29 funding request
 - For these positions, total current annual compensation, inclusive of stipends, COLAs ,and any other monetary compensation paid out of all City funds (operating and enterprise)

Additional questions (that I am happy to discuss beforehand and also anticipate asking in the meeting):

- What is the stated purpose for the contract stabilization, water retained earnings, and sewer retained earnings funds? Is this stated purpose set by: state statute/charter/city admin/all of the above?
- Are there any collective bargaining units within the City (including those under MPS) that are not eligible to access the contract stabilization fund? If so, why?
- Orders 2023-30 and 2023-31 reference that the funding request is for FY 23 funding for a union contract. When was this contract settled? Are these raises retro to the start of the fiscal year? Were any of these raises budgeted for in the current FY 23 budget, or is the totality of the increases being absorbed through the stabilization and retained earnings fund?

Thank you.

Best,

Jen

[Jen Grigoraitis, she/her/hers](#)

[Ward 6 Councilor, City of Melrose](#)

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Established Council Order 06-221 in accordance with MGL Chapter 40, Section 5B		
8404 Contract Stabilization		
Detail	Description	Funding Orders
Opening Balance Fiscal year 2013		
2014-74	Clerical - 1 Year	(17,104.23)
2015-102	Library 1 Year	(12,343.95)
2016-55	Laborers 1 Year	(73,241.53)
2016-56	Laborers 1 Year Cemetery	(19,718.89)
2017-39	Fire 2 Years	(369,520.22)
2017-36	Clerical - 1 Year	(9,593.40)
2017-109	Patrol 2 Years	(213,259.09)
2018-55	Library 1 Year	(13,000.00)
2018-152	Fire 1 Year	(103,750.00)
2019-52	Police 1 Year	(101,827.00)
2020-17	City Solicitor - Liquor Commission stipend	(5,000.00)
2020-18	Clerical - 1 Year	(61,138.14)
2022-42	Fire - 2 Years	(317,693.00)
		(1,317,189.45)



CITY OF MELROSE
In Board of Aldermen

3.5.d

June 5, 2006

AN ORDER
06-221

Creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund", in accordance with Massachusetts General Laws Chapter 40, Section 5B

Offered by Mayor Robert J Dolan
BE IT ORDERED

that, the creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" Number 8404, in accordance with Massachusetts General Laws Chapter 40, Section 5B be, and hereby is passed.

PASSED

JUN - 5 2006
[Signature]
President of the Board of Aldermen

APPROVED

JUN - 7 2006
[Signature]
MAYOR

Attachment: 2006-221 Creation of Contractual Obligations S&W Stabilization Fund (ORDER-2023-29 : An Appropriation from Contract



CITY OF MELROSE

Melrose, 25 ^{MAY} June 2006

The Committee on

Appropriations

To Which Was Referred Paper No.

06-221

Entitled

Creation of a new Stabilization Fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund", in accordance with Massachusetts General Laws Chapter 40, Section 5B

REPORTS as Follows:

that it recommends passage of the Order.

For the Committee

Robert A. Boisselle

Chairman

**CITY OF MELROSE**

MELROSE CITY HALL
562 Main Street
Melrose, Massachusetts 02176

ROBERT J. DOLAN
Mayor

Telephone: (781) 979-4444
Fax: (781) 662-2188

May 11, 2006

To the Honorable Board of Aldermen:

I respectfully request the creation of a new stabilization fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" in accordance with Massachusetts General Laws Chapter 40, Section 5B

Robert J. Dolan
MAYOR

GUIDELINES:**I. MULTIPLE STABILIZATION FUNDS****A. Creation of Funds**

Stabilization funds may be created for one or more different purposes. G.L. Ch. 40 §5B. A fund may be created for a broad category of spending purposes, *e.g.*, any lawful purpose, capital budget purposes or purposes for which the community may borrow money. It may also be created for a specific purpose or project, *e.g.*, acquire a new fire truck or undertake a particular school construction project.

Creation of a fund requires a ~~(two-thirds vote)~~ of the legislative body of the city, town or district. The vote must clearly define the purpose(s) of the fund.

B. Pre-existing Fund

Any pre-existing stabilization fund balance should continue to be treated as a reserve for any lawful purpose, *i.e.* a "general" stabilization fund. The city, town or district can reallocate or earmark all or part of that balance to any new stabilization funds it creates by a vote to transfer monies from that "general" stabilization fund to the newly created fund. See Section I-D below.

C. Changing Fund Purpose

The purpose of a stabilization fund may be changed at any later time by a two-thirds vote of the legislative body. For example, if a community had established a fund in order to reserve monies to acquire a new fire truck and a balance remains after the purchase, the legislative body could vote to change the purpose to meet some new savings objective.

If a Proposition 2½ levy limit override was approved for the purpose of funding the particular stabilization fund, however, the city or town must also follow the referendum procedure explained in Section II-C below to be able to change the fund purpose and then continue using the additional levy capacity resulting from that override in future years.

D. Appropriations and Transfers

Appropriations into and from any stabilization fund require a two-thirds vote of the legislative body.

**CITY OF MELROSE**

MELROSE CITY HALL
562 Main Street
Melrose, Massachusetts 02176

ROBERT J. DOLAN
Mayor

Telephone: (781) 979-4444
Fax: (781) 662-2111

May 11, 2006

To the Honorable Board of Aldermen:

I respectfully request the creation of a new stabilization fund entitled "Contractual Obligations and Salary & Wages Stabilization Fund" in accordance with Massachusetts General Laws Chapter 40, Section 5B

Robert J. Dolan
MAYOR

PUBLIC HEARINGS

Public Hearing Set _____

Melrose Free Press _____

MMTV _____

Public Works Notified _____

Utilities Notified _____

Abutters Notified _____

Post Call _____

Invoice _____

LICENSES

Sent Fire ☐ CORI ☐

Building ☐ Health ☐

Wts. & Meas. ☐ Police ☐

Rec'd Fire ☐ CORI ☐

Building ☐ Health ☐

Wts. & Meas. ☐ Police ☐

Class II Bond ☐

Workers Comp Affidavit ☐

CLAIMS

Auditor ☐ City Solicitor ☐

Public Works ☐ _____ ☐

_____ ☐ _____ ☐

emailed to department heads ☒

Ordinances changes: _____

Mailed to General Code ☐

Copy to Book ☐

APPOINTMENTS

Letter ☐ Oath ☐

Nº 06-22 / original date May 15, 2006

In Board of Aldermen

Referred to Committee on

Appropriations

Creation of a new Stabilization Fund entitled
"Contractual Obligations and Salary & Wages
Stabilization Fund", in accordance with
Massachusetts General Laws Chapter 40, Section
5B

JUN 05 2006

Passed as amended ☐ Passed ☒

Rule _____ suspended ☐ Defeated ☐

Immediate consideration ☐ Place on file ☐

Reconsideration defeated ☐ Reconsidered ☐

Leave to withdraw ☐ Tabled ☐

Granted, adopted, confirmed ☐ Recommended ☐

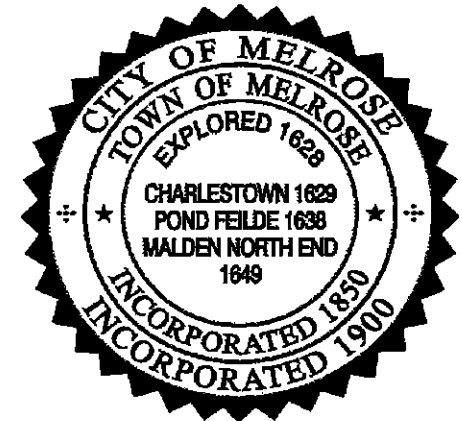
Null & Void ☐

Ordained Roll Call ☐ Yea ☐ Nay

Mary Rita O'Shea
Clerk

Aldermen	Yea
Boisselle	☒
Brodeur	☒
Buonopane	☒
Conn	☒
Forbes	☒
Heavey	☒
Mortimer	☒
Seaboyer	☒
Tramontozzi	☒
Wright	☒
Infurna, Pres.	☒

TOTAL	10	0
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FY23 CLASSIFICATION PLAN	
City of Melrose	
Grade / Position	
6	
	<i>No Positions Assigned</i>
7	
	<i>No Positions Assigned</i>
8	
	Administrative Assistant-PT (Veterans, Recreation, Police)
	Event Operations Assistant - Memorial Hall
	Pine Banks Laborer
9	
	Animal Control Officer - PT
	Assistant Parks Superintendent
	Human Resources Assistant
	Program Coordinator - MA in Motion
	Program Coordinator - Tobacco/Alcohol
	Recreation Coordinator
10	
	Assistant to the Director of Inspectional Services
	Executive Assistant to City Solicitor
	Executive Office Manager - Police
	Finance Administrator - Fire Dept./Public Safety
	Milano Center Manager (COA)
11	
	Assistant City Clerk
	Clerk of Committees
	Finance Manager (Auditing)
	Public Health Specialist
12	
	Cemetery Administrator
	Communication and Community Outreach Coordinator
	Emergency Management Director
	Local Building Inspector (Certified)
	Plumbing and Gas Inspector
	Sealer of Weights and Measures
	Project Engineer
	Water-Sewer Administrator (Billing)
	Wiring Inspector
13	
	Assistant Library Director/Head of Technical Services
	Assistant Treasurer
	Building Systems Supervisor - DPW
	Human Resources Coordinator
	Project/ Systems Administrator
	Senior Planner
	Sustainability Manager
	Systems Analyst IT (city and schools) - networks/databases

FY23 CLASSIFICATION PLAN
City of Melrose
Grade / Position
14
Veterans Services Director (Regional Position)
15
Director of Economic Recovery and Business Development
16
Assistant Director of IT
Executive Director Melrose Memorial Hall
City Clerk
17
Deputy City Engineer
Financial Systems Analyst/Project Manager (Auditor/IT Depts.)
Recreation Director
Superintendent of Parks (Mount Hood. Golf Course,Open Space)
18
Assistant Auditor
Council on Aging Director
Executive Director - Melrose Retirement System
Facilities Manager - City and Schools
Operations Manager - DPW
19
Assistant Director - DPW Administration and Finance
Chief Assessor
City Engineer
Director of Community Development and Planning
Director of Inspectional Services/Building Commissioner
Director of Strategic Initiatives and Communications
Health Director (Regional)
Library Director
Treasurer/Collector
20
Assistant City Solicitor
21
Chief Information Officer (city and schools) / IT Director
Human Resources and Labor Relations Director
22
<i>No Positions Assigned</i>
23
Chief Financial Officer and City Auditor
City Solicitor - Labor Counsel
Director of Public Works

MELROSE CONSOLIDATED CNU PROPOSED FY2023 PAY PLAN

Step Grade	1	2	3	4	5	6	7	8	9	10
8	20.91	21.33	21.76	22.20	22.64	23.09	23.55	24.02	24.50	24.99
9	27.54	28.09	28.65	29.22	29.80	30.40	31.01	31.63	32.26	32.91
10	31.62	32.25	32.90	33.56	34.23	34.91	35.61	36.32	37.05	37.79
11	34.75	35.45	36.16	36.88	37.62	38.37	39.14	39.92	40.72	41.53
12	38.25	39.02	39.80	40.60	41.41	42.24	43.08	43.94	44.82	45.72
13	40.80	41.62	42.45	43.30	44.17	45.05	45.95	46.87	47.81	48.77
14	42.84	43.70	44.57	45.46	46.37	47.30	48.25	49.22	50.20	51.20
15	44.68	45.57	46.48	47.41	48.36	49.33	50.32	51.33	52.36	53.41
16	48.96	49.94	50.94	51.96	53.00	54.06	55.14	56.24	57.36	58.51
17	50.75	51.76	52.80	53.86	54.94	56.04	57.16	58.30	59.47	60.66
18	52.79	53.84	54.92	56.02	57.14	58.28	59.45	60.64	61.85	63.09
19	54.88	55.97	57.09	58.23	59.39	60.58	61.79	63.03	64.29	65.58
20	57.63	58.78	59.96	61.16	62.38	63.63	64.90	66.20	67.52	68.87
21	62.99	64.24	65.52	66.83	68.17	69.53	70.92	72.34	73.79	75.27
22	66.10	67.42	68.77	70.15	71.55	72.98	74.44	75.93	77.45	79.00
23	75.07	76.57	78.10	79.66	81.25	82.88	84.54	86.23	87.95	89.71



HUMAN RESOURCES SERVICES, INC.
Management Consultants to Local Government

Nine Bartlet Street, Suite 186
Andover, Massachusetts 01810
www.hrsconsultinginc.com

CITY OF MELROSE, MASSACHUSETTS



COMPENSATION AND CLASSIFICATION STUDY
Non-Union Positions

FINAL REPORT

April, 2022



HUMAN RESOURCES SERVICES, INC.
Management Consultants to Local Government

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 Andover, Massachusetts 01810
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April, 2022

Mayor Paul Brodeur
 City of Melrose
 562 Main Street
 Melrose, MA 02176

Dear Mayor Brodeur,

Human Resources Services, Inc. (HRS) is pleased to present this ***Compensation and Classification Study for Non-Union employees*** to the City of Melrose, MA. This report represents the culmination of a detailed position classification and compensation review for all non-union employees engaged in a variety of municipal work activities. This report, along with the Organizational Needs Assessment Report submitted separately provides the City of Melrose with the totality of the analysis as it was conducted for the City. The City had made the decision that the two elements (comp/class and organization review) of the consulting engagement should be developed for better efficiency and implementation.

In particular, we wish to thank the Human Resources and Labor Relations Director, the Chief Financial Officer/Auditor, Mayor's staff, and non-union employees and managers who have contributed significantly to this effort. Employee input through forms and on-site interviews, as well as comments and suggestions received, made a valuable contribution to the study. We greatly appreciate everyone's ability to meet with us and provide information in a timely manner. HRS will remain available

to answer any procedural questions the City may have in the implementation of the study's recommendations. While this is a final report, we will remain available to make any modifications needed to make this a useful tool for the City.

Very truly yours,

Sandy

Aleksandra E. Stapczynski
President



HUMAN RESOURCES SERVICES, INC.
Management Consultants to Local Government

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Tony Torrisi, Management Consultant

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CITY OF MELROSE, MASSACHUSETTS COMPENSATION AND CLASSIFICATION STUDY FOR NON-UNION

I. Introduction

A. Scope of Services

The City of Melrose, MA retained Human Resources Services, Inc. to conduct a comprehensive compensation and classification study of Non-Union Positions. This study was commissioned to examine the responsibilities, work performed, and market pay rates for each position included in the study. In general, the study involved developing new job descriptions, classifying those positions according to a uniform point analysis standard, surveying the market of comparable municipalities and other organizations as needed to determine representative rates of compensation, and developing and *recommending* a new compensation and classification plan and system for the non-union group of positions.

The objectives of the study were to:

- Develop a job evaluation system that would encompass all non-union positions and ensure that compensation levels were both internally equitable and externally competitive.
- Develop for the City the necessary guidelines for administering compensation on an ongoing basis to ensure that pay levels remain equitable and competitive.

In scope, the study included all non-union positions (approximately 70 in number). Another approximate dozen positions were evaluated for

compensation only for the organizational review and staffing needs.

HRS' approach to the study was comprehensive. The study began by collecting job content information for those positions to be evaluated. Job content evaluation factors and appropriate factor weightings were prepared and analyzed. The evaluation process involved a comparative approach where each position was compared to all others on each evaluation factor, one factor at a time.

A grade structure was developed by tabulating competitive data for the benchmark positions and studying trends in the market. A tentative pay structure and classification listings were presented to the City for their consideration. Employee listings comparing each individual's salary to the proposed structure and associated implementation costs were prepared for Finance.

This report is prepared for the City to document in detail the procedures for position evaluations and gradings and development of the salary structure. It also sets forth the recommendations for the implementation and ongoing administration of the system.

Through the consultant teams evaluation comparing both market data and job ratings point totals, it was determined the appropriate number of salary levels needed to clearly differentiate varying levels of job value. Twenty-three salary levels emerged as a suitable number for the City to develop a new consolidated non-union compensation and classification plan. Positions were assigned to a salary grade level on both the basis of its total point scores, and the external job market.

A position compensation and classification plan is an essential component of a total personnel administration program. The perception that the compensation plan is objective and fair in its assignment of pay to individual positions lends credibility to the organization's entire personnel system. This study and its recommended plan is derived from a systematic, formalized and objective method for developing equitable job groupings and compensation levels for all positions covered. An underlying assumption is that all positions and individuals should receive "equal pay for equal work." However, the initial implementations of the recommended plans are not the final steps in achieving job equity. Rather it establishes a uniform point of beginning from which to regularly review and ensure that decisions regarding position requirements and compensation accurately reflect the organization's current service needs and the performance of employees. Each new position established and adjustments to the plan need to be done in a consistent manner to maintain the plan's integrity and relevance.

According to the Massachusetts Employment Pay Act, (MEPA), employees doing equal work should be paid equally. Our methodology and system addresses the major components required of MEPA. For work to be equal or comparable, it must involve substantially similar skill, effort, and responsibility, and be performed under *similar* working conditions, but are not necessarily identical or alike in all respects. The requisite requirements or skill includes an employee's experience, training, education, and ability to perform the jobs. An employee's skill must be measured in terms of the performance requirements of a job, that is why it is important to always ensure that the job descriptions are up to date and accurate so employees know what is expected of them in their jobs. Effort refers to the amount of physical or mental exertion needed to perform a job. Finally, responsibility encompasses the degree of discretion or accountability involved in performing the essential functions of a job.

For maximum effectiveness, the relationship between consultant and client must be a cooperative effort. While Human Resources Services assumes responsibility for all final recommendations, client input has been actively sought, carefully weighed and incorporated into the report whenever possible and appropriate.

B. Specific Study Process

This project included the following steps:

- *Organizational Meeting* with Mayor, HR Director, and Finance to discuss the goals and objectives of the study; and to orient top executives on the process and methodology that would be used.
- *Several Orientation Meetings* with employees and managers to explain project activities, objectives, methodology. Position Analysis Questionnaires were distributed to employees at these orientation sessions. The meetings also gave everyone an opportunity to meet HRS consultants and to ask questions.
- *A thorough Job Analysis Process* which involved reviewing position duties and responsibilities (essential functions) and requisite requirements of the job, utilizing position analysis questionnaires and on-site interviews with all employees.
- *Preparation of updated Job Descriptions* with review and comment from employees, managers and HR staff. The client had an opportunity to

thoroughly review the draft job descriptions.

- A thorough *Job Evaluation Process*. Position rating and ranking utilizing HRS' rating manual.
- Development of a *Classification Plan*. Position assignment to grades based on a system of objective evaluation.
- Thorough *Market Analysis* using primarily comparable municipal organizations jointly selected by the City of Melrose and HRS.
- Establishment of *Compensation Schedule* using comparative wage data as a general guide.
- Several *meetings in person and through telephone conference* with the *Chief Financial Officer and Human Resources Director* to discuss pay policies and review draft work products (i.e. job descriptions, classification plan, salary schedule, comparative data, ratings, and other related project documents).
- General guidance on *Implementation*.
- Final *Presentations* to the City and employees shall be given upon request of the City. Based on any additional information received, HRS shall make adjustments as appropriate and amended the Final recommendations.

- Final preparation of *Report* to the City of Melrose with explanation of recommendations and methodology.

The following documents have been prepared for the City of Melrose:

- Proposed Position Titles
- Proposed Classification Plan
- Proposed Compensation Plan
- Compensation Comparisons Chart
- Market Data Analysis
- Placement and Costing out of Compensation Plan
- Position Analysis Question (PAQ)
- Updated Job Descriptions for each Position
- Evaluation Materials and Documents
- HRS Position Rating Manual

II. Job Descriptions

A. Preparing the Job Descriptions

One major aspect of this study involved the development of updated job descriptions. Through the job analysis process, HRS discovered that many of the current job descriptions were outdated and there was no consistent format for descriptions. HRS' proposed job descriptions are submitted to the City of Melrose as part of this final report; they are provided in electronic Word format only. They also provide the necessary language to aid in recruiting minority employees, as the City has made diversity and inclusion a major emphasis in all recruitment efforts.

In addition to assisting with the development of job analysis and classifications, good descriptions produce many other important benefits. These job descriptions emphasize the purposes of each position and the types of results which each incumbent is expected to produce. Representative examples of the work performed and minimum qualification requirements are listed. These job descriptions are small but important components of more comprehensive personnel, organizational and administrative systems or plans. They can and should be used not only for recruitment and promotion, but as tools to assist in the administration of the City. They help define initial expectations, provide fundamental building blocks for administering compensation systems, and give additional definition to organizational charts. Because they focus on purposes and results, they can and should be used when developing employee objectives, performance plans and performance appraisals.

The job descriptions presented to the City are up-to-date, clear, and identify the duties of each position, as well as the education, experience, training, knowledge, ability, and skills, and competency levels required.

B. The Significance of Job Descriptions.

Today, job descriptions have become more important than ever. Although employers are not required by law to have written job descriptions, there are many laws that impact the employer-employee relationship and having job descriptions can help the organization comply with those regulations. There are federal laws such as the Fair Labor Standards Act (FLSA) that impact employees. Other laws, such as federal discrimination statutes, prohibit discrimination against various protected classes. Because job descriptions document the duties and qualifications of a job, they can help support why one applicant was qualified and another was not, why one position pays more than another, or why an employee is terminated for poor performance.

Under the ADA, job descriptions, particularly the lists of duties and responsibilities, take on new significance. The purpose of the ADA is to ensure that individuals *with* disabilities be given the same consideration for employment that individuals *without* disabilities are given. Essential functions are the primary or fundamental job duties intrinsic to a position, that is, the duties that are essential to achieving the objectives of the job. Related to the essential functions or duties are the tools and equipment used to perform the essential job functions, the physical demands of the job duties, and the work environment in which the duties are performed.

The new job descriptions include: (1) prerequisites for each position, including the physical needs, knowledge, ability, and skill, education, training and experience; (2) essential job functions; and (3) work environment. All job descriptions should be reviewed and updated periodically to ensure accuracy. Positions can change for many reasons: (1) an incumbent starts assuming more responsibilities in addition to the duties in the job descriptions, (2) staff changes, (3) changes in procedures and

processes, (4) new technology, tools, or machines, (5) external regulations or legislation, (6) reorganizations, (7) new supervisor or manager.

In short, the process of developing accurate and uniform job descriptions forces the employer to analyze each position and to identify the position's necessary qualifications (the "requisite skill, experience, education, and other job-related requirements"), as well as to determine the position's "essential functions."

III. Classifying and Compensating Positions

A. The Classification Plan

It is important to consider the objectives of (1) **Job Analysis** and (2) **Job Evaluation** when reviewing the proposed classification plan. Building the classification plan involved both job analysis and job evaluation.

Of critical importance in the process of reviewing jobs are the inherent job factors and the particular skills or quality of work required of the position. A thorough **Job Analysis** produces, in general, five kinds of basic information to aid in this process:

1. *nature of the work* (e.g., essential functions and purpose/objective of the position)
2. *level of the work* (e.g., degree of complexity and accountability)
3. *job requirements* (e.g., the knowledge, skills, abilities and other special requirements/characteristics needed to perform the job)
4. *job qualifications* (e.g., minimum education, training and experience needed to qualify)
5. *working conditions* (e.g., the psychological, emotional and physical demands placed on employees by the work environment).

Information about each position studied was obtained through detailed position analysis questionnaires (PAQ) and employee interviews. Employees were asked to describe their positions in detail on the PAQ form. Examples of information requested from the PAQ included: job summary, essential functions, education, training and certifications, knowledge, ability, skill, experience, physical requirements, supervisory responsibilities, and technologies and equipment used. Finally, interviews were conducted to clarify and augment the employees' questionnaire responses.

Job Evaluation is a process that establishes the relative value of jobs within an organization. There may be several reasons for carrying out this process; the main ones are: (1) to establish the correct rank order or groupings of jobs, (2) to establish the relative distance between jobs within the ranking, (3) to provide an objective measurement of job size for comparison with other jobs and enable salary comparisons to be made.

Job evaluation is the process whereby positions are analyzed, measured and compared against a common set of criteria in a systematic and objective manner. Job evaluation does not produce a rate of pay. Rather, it produces a ranking of jobs in terms of "job content" around which a salary structure can be established. Similarly, the evaluation process does not measure an individual's performance. The evaluation looks at the job, not the job holder; it assumes that the job is being performed to a fully acceptable standard and that all the identified requirements of a job are being met.

Using a point-factor evaluation system, positions were rated by the consultants and then ranked and assigned a grade. Fourteen rating factors were used to rate all of the positions. These factors, detailed in HRS' Municipal Position Classification and Rating Manual, measured the requirements of each position in various areas. The following are a listing of each rating factor. The manual describes each factor in great detail and by degree.

1. Physical Environment
2. Basic Knowledge, Training and Education
3. Problem Solving Skills and Effort
4. Physical Skills and Effort
5. Experience
6. Interactions with Others/Customer Service
7. Confidentiality
8. Occupational Risks
9. Complexity
10. Supervision Received
11. Supervision Given
12. Supervision Scope
13. Judgment and Initiative
14. Accountability

As mentioned previously, job rating is not synonymous with performance evaluation. The position, not the incumbent, is evaluated, assigned points and a grade derived. One of the best information sources for rating a position is a current and relevant job description and/or a recently completed PAQ which is why these should always be completed early in the process. The process described in HRS' Municipal Position Classification and Rating Manual increases the uniformity and objectivity in the application of judgments about positions and the groupings of positions. This process can be used to update the proposed classification plan, to determine how to place new positions on the plan, and to re-grade a current position with adjusted duties to a different grade. Samples of the *Position Rating Summary Sheet* are included in the Manual along with the *Points Assigned to Factor Degrees*. A custom *Grade Determination Scale* was developed for the City of Melrose.

B. Market Survey and Developing the Compensation Plan

Human Resources Services, Inc. conducted a thorough salary survey and market analysis to determine the market competitiveness for positions included in this study. To measure the pay rates among competitors for these positions, HRS distributed custom survey documents to comparable municipal organizations jointly identified by the City and HRS. For this study, HRS received survey responses from the following Massachusetts municipalities for compensation, benefits and other related information:

1. Arlington
2. Newburyport
3. North Andover
4. Peabody
5. Reading
6. Salem

7. Saugus
8. Stoneham
9. Wakefield
10. Winchester; and
11. ERI and MMHR Data

The City of Melrose is a well-managed forward-thinking community with a history of a creative and complex organization. The consultant team met with city management/finance and human resources staff to review a draft pay/class plan and to review the market data collected and discuss its meaning. An initial analysis of the market data involved reviewing the average, median, range, 75th percentile and 90th percentile. A comparison was then made to current Melrose salaries for this non-union group of positions.

All of the comparative data is current information and presented on the following pages. Most of the data was collected during the fall of 2021. HRS collected minimum and maximum salary ranges from the comparable organizations. Certain data may have been pro-rated to hourly for comparison purposes only. In each cell, the top number indicates the minimum salary range for each position and the bottom number indicates the maximum salary range for each position. Virtually every organization had some type of a pay/class structure.

For each position analyzed, data points were collected from the labor market. The data points indicate the amount of salary information for each position surveyed. In some instances: (1) the organization did not have a comparable position; or (2) the consultants determined that the position was not comparable to the position in Melrose. HRS used professional discretionary judgment when comparing positions to the comparable data. If there was less than two data points of salary information for a position, HRS placed more emphasis on the position rating when placing the position on the compensation/classification plan. While this market analysis and information provides the City of Melrose with benchmark salary data to set the parameters for compensation decisions, the client must also consider the “uniqueness” of certain positions in the organization as well as the organization’s compensation policies. The compensation and classification plans are attached to this report for your review.

C. Description of Compensation and Classification Plan

Setting the rates of pay for jobs on the position hierarchy results in what is called a “pay structure”. When reviewing or developing pay rates, a number of major policy decisions are typically made. For example: How should the City’s pay rates compare to the market? How competitive does the City want to be? What type of structure is best for the City; steps, ranges, quartiles, etc. For what does the City want to pay? (i.e. job content, seniority, performance, cost of living, etc.) How does the organization currently pay its employees? The resulting compensation plan must reflect the City’s pay policies, the market place, internal job values, and the financial desire of the City to pay at a given level to attract needed talent. It should also ensure internal and external fairness. “Internal” being comparable worth within

the organization of the classification plan; and “external” being the market to ensure a competitive pay structure.

The proposed compensation and classification plan is presented on the following pages. Pay ranges were set for groups of positions which the consultants determined should be paid equally. There are twenty-three grades for this group and ten steps for each grade. There is 2 percent between each step. The City’s current pay structure for the non-union positions includes a variety of pay scales. These were consolidated into one uniform compensation plan, thus making it less complex. This will allow for more equity, especially when hiring new employees. Also the entire pay structure in its entirety has been updated to reflect the market. Comparative data was considered to set the grade parameters, while the classification process controlled the internal assignment of positions to progressive compensation levels. Currently, the City operates within a context of “pay steps” for this group of non-union positions. HRS recommends continuing the policy on pay steps for easier maintenance and consistency of the plan. In general the pay ranges were developed utilizing the salary market data and targeting approximately the 75th of market. It was necessary to target the 75th of market in order to remain competitive as compared to other advanced municipalities in Massachusetts. HRS provided the City with additional benchmark salary data too from its ERI (Economic Research Institute) database of salaries and wages.

The proposed compensation plan is based on current compensation data. This is a base salary plan and does not include compensation for stipends, cost-of-living, benefits, or other compensation. It is up to the City to determine its ability to pay with regards to implementation of this proposed pay plan.

Those employees falling below the grade range should be brought into the entry level of the grade ranges as soon as possible. The salary schedule should be updated with a cost-of-living for each succeeding fiscal year. The consultants costed the plans in a variety of ways for the finance department, but it is up to the City to determine the policy for implementation. HRS will of course remain available to provide the necessary guidance.

IV. Implementation and Other Recommendations

The following sections are intended to assist and guide the City of Melrose in implementing the proposed compensation and classification plan for non-union positions. Successful implementation will require a concerted effort by management, employees and city officials.

1. Compensation Structure and Maintenance

The recommended pay structure contained in this report is designed to provide appropriate compensation through the next three fiscal years. An initial review of the structure would be appropriate by fiscal year 2026, and then subsequent reviews annually. Review of the structures should take into consideration both internal and external conditions.

The distribution of individual salaries, both by salary level and position within salary level, should be regularly examined to determine whether there is sufficient opportunity for continued salary growth.

Since organizational arrangements and position duties and responsibilities may change from time to time, it will be necessary periodically to reevaluate existing positions and evaluate new positions.

It is most important that Melrose regularly audit and review their compensation system to ensure its validity. We believe that Melrose did not do this for some time, and therefore their plans were outdated.

2. Initial Placements for Current Employees

The placement of two or more positions on a certain grade represents a judgment that those positions should be compensated comparably within the grade range provided. The range is like a scale providing the City with

the opportunity to make distinctions between employees (not positions) based upon established criteria, applied consistently. These criteria might include job performance, special abilities, experience, longevity, gender-equity, and/or any other factors determined by the City.

For initial placement of incumbents within the plan, the City should assign employees to be placed at the step closest to but just above their current wage/salary in order to not reduce the pay of any current employee. The City should also realize that this minimum approach may not recognize certain distinguishing factors among employees.

3. Salaries Below Pay Range

If the salary of an employee is below the minimum of the grade range at the time of implementation, every effort should be made to bring it into the range.

4. Salaries Above Pay Range

To maintain morale and a sense of fairness, HRS recommends the City not reduce the compensation level of any current employee. If an employee's current salary falls above the upper limit of the recommended grade range, then the City should maintain the employee's salary above the maximum for the grade until the employee retires or separates from the City. This is called "red-circling" a position. New employees can be hired at the appropriate lower pay rate. HRS recommends a single administrative policy be adopted and subsequently applied in all cases.

5. Consolidate Classification Plan

HRS recommends that the City develop one consolidate classification plan as we have proposed in this report for the non-union positions, the multiple

salary schedules approach based on hire date should be eliminated. One consolidated plan will ensure better internal equity for positions; so the rating point values of grades are the same and consistently applied; and so the pay equity of positions match the requirements of MEPA; and finally the entry pay is similar for those falling on a similar grade. (Currently the City has multiple plans for the non-union.)

6. Vacancies

When a vacancy develops, it is a good time to automatically review the position. This may involve a job analysis and updating the job description and reviewing the market for the particular position. Positions should also be evaluated according to the appropriate rating factors. Point totals should be calculated for each position by adding the point scores from the degree levels achieved under each factor. On the basis of total points, position generally should be assigned to the appropriate salary levels, according to the established salary level point ranges; and also taking into consideration the external market.

7. Salary Plan

HRS has proposed the following:

- Creation of a salary schedule with each grade having a salary range consisting of a minimum and maximum; and series of steps.
- Positioning of the salary structure at the 75th of market.
- Establishment of a competitive salary schedule, particularly for those fields of study that are considered to be in high demand and that may command high salaries in the market (i.e. Finance, Health, Technology, Facilities, etc.).

8. Update and Maintain the Classification and Compensation Plan

The human resource department should maintain and update the compensation and classification plan. This would include the following tasks:

- Conduct regular position reviews to assure positions have current functional job descriptions that are based on job content.
- Conduct job analysis of new positions to assure these positions are properly assigned to a grade.
- Review positions to ensure internal equity in relationship to other City of Melrose classifications.
- Conduct periodic salary surveys to ensure market competitiveness.
- Review MEPA requirements.

9. FLSA Status

HRS also determined the FLSA Status (exempt/non-exempt status) of the positions included in the study. HRS recommends that City of Melrose regularly evaluate the FLSA status with its labor counsel, as case law may cause changes. HRS utilizes the ERI Occupational Assessor to determine FLSA status of positions. The results of the FLSA audit information was provided to Human Resources.

10. Cost-of-Living Increases vs. Step/Range Movement

Here, it is important to distinguish between (1) a cost-of-living increase and (2) a step increase. A cost-of-living increase is intended to recognize and respond to a general rise in the cost of goods and services experienced by the general population. Each year, the City should determine an appropriate cost-of-living adjustment and apply that increase across the entire compensation schedule. A range movement (step increase) addresses the issue of how employees move along the levels within a grade from minimum to maximum, based on performance, longevity, special skill, certification, etc. The compensation plan should consist of two components: (1) the range adjustment factor (RAF); and (2) the movement-increase factor (MIF), which is based on merit step increase. The RAF is the movement of the total salary range, while the MIF is the movement *through* the salary range steps. A salary-range increase consists of the sum of these two components, plus their interaction or compounding result; thus a salary/wage adjustment. It is very important to regularly update the entire compensation structure with a COLA, or it will quickly become outdated, and the City will have difficulty recruiting talent.

11. Performance Appraisal and Merit-Increase.

It was not within the scope of services for HRS to develop a performance appraisal “tool” for the City of Melrose, MA. HRS has a few suggestions, should the town decide to implement a new updated performance system. A *Management by Objectives System* would be an appropriate methodology for employees engaged in high-level managerial, supervisory or professional positions. A *Uniform Performance Criteria System* is the most commonly used methodology and is best suited to positions where employees

consistently perform the same type of work on a fairly regular basis. This format works well for administrative, clerical, laborers, and other non-exempt positions. The City should consider updating its performance appraisal systems and provided the necessary training for employees, supervisory personnel, and department heads.

12. Determination of Individual Wages/Salaries.

What follows are some general implementation and maintenance guidelines.

a) New Employees

Applicants with qualifying experience are normally hired close to the normal starting rate of the new range. Applicants with outstanding qualifications; education, training and experience may be hired at the wage/salary within the range for the position, but normally no higher than the midpoint of the range. In rare cases, for positions that are very difficult to recruit, it may be necessary to hire beyond the mid-point of the pay range.

b) Transfers

Employees transferred to a position at the same level as their present position will normally receive the same salary paid at the time of the transfer.

c) Transfer to a Lower Salary Grade

Employees transferred by necessity (such as reduction in staff), rather than for inadequate performance, should receive their present salary, although this may exceed the maximum for the lower classification.

d) Promotional Increases

If employees are promoted on a “trial” or “acting” basis, the promotional increase may be deferred until they have demonstrated their ability to handle the duties of the higher classification.

In closing, this HRS methodology will be of assistance in furnishing improved tools and guidance to management and human resources. Ensuring that job descriptions, salary and classification plans are regularly reviewed and have valid methodologies will ultimately improve the management of compensation for all positions. The HRS System will provide a framework within which most salary matters can be handled going forward. While both job evaluation and salary surveys attempt to achieve consistency in the pay structure, they use different criteria to evaluate consistency (i.e. internal vs. external comparison). This methodology works at striking a balance between internal and external pay equity.



ATTACHMENTS

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Administrative Accounting Assistant (Police) - PT	19.51 21.50	4 5	24.49 31.24	19.00 35.44	25.11 31.20	27.66 35.44
Animal Control Officer - PT	24.47 26.96	4 7	21.68 30.55	14.00 38.84	21.92 30.00	24.43 35.86
Assistant Auditor	36.95 47.49	6 8	31.90 41.62	23.91 60.91	31.05 39.23	34.82 45.36
Assistant City Clerk	31.68 40.71	7 10	29.12 35.88	17.21 55.88	28.46 34.29	33.14 35.33
Assistant City Solicitor	46.21 59.39	3 4	38.89 51.61	17.21 78.53	45.11 52.34	49.73 72.78
Assistant Director - DPW Administration and Finance	52.02 66.84	5 8	38.72 51.18	22.60 62.32	42.66 54.75	45.10 56.50
Assistant Director of IT	36.95 47.49	2 2	41.97 54.80	38.29 59.06	41.97 54.80	43.80 56.93
Assistant Director of Planning and Community Development	31.03 34.19	2 4	43.62 55.51	42.66 58.87	43.62 55.03	44.10 56.11
Assistant Library Director/Head of Technical Services	36.95 47.49	6 7	33.73 43.25	20.34 60.91	34.37 39.93	40.00 49.73
Assistant Parks Superintendent (Benchmark)	not on plan	2 2	30.33 40.58	27.05 45.56	30.33 40.58	31.96 43.07
Assistant to the Director of Inspectional Services	25.93 33.32	4 5	28.67 34.27	19.72 45.08	30.54 36.59	31.95 38.60
Assistant Treasurer	36.95 47.49	9 10	30.82 39.39	17.21 55.88	31.30 38.35	32.08 40.59
Building Systems Supervisor (HVAC Supervisor) - DPW	34.47 37.98	5 5	31.37 42.65	25.84 50.48	32.67 43.11	34.58 48.23
Cemetery Administrator	31.03 34.19	4 5	29.58 39.24	24.75 48.02	29.99 38.05	33.10 45.02
Chief Assessor	48.05 61.74	7 10	41.46 56.78	27.99 74.16	41.67 52.14	45.16 66.12
Chief Financial Officer and City Auditor	68.93 87.69	5 8	50.95 66.72	32.37 78.53	54.35 67.03	55.46 74.13
Chief of Police	contract 63.58	5 8	61.52 81.44	50.53 94.33	59.78 82.82	68.88 88.33
City Clerk	39.52 50.78	3 8	39.92 49.17	37.28 66.39	37.88 47.65	41.24 50.97
City Engineer	45.76 58.80	6 9	43.81 55.47	30.31 68.29	45.21 55.00	48.03 64.37

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
City Planner	40.21 44.30	3 4	36.17 49.01	33.15 60.91	34.44 46.91	37.68 52.95
City Solicitor - Labor Counsel	65.03 82.73	4 5	55.14 71.24	29.33 90.19	57.62 73.48	63.84 86.39
Clerk of Committees	30.80 39.58	1 2	35.64 47.87	35.64 49.80	35.64 47.87	35.64 48.83
Council on Aging Coordinator	19.51 21.50	3 4	23.90 25.78	23.15 29.94	24.04 25.95	24.28 28.01
Council on Aging Director	48.05 61.74	8 8	35.88 45.75	22.78 60.91	34.85 42.58	39.85 53.70
Communication and Community Outreach Coordinator	31.63 40.71	3 6	30.70 39.77	21.29 48.02	32.93 41.46	35.41 46.14
Deputy City Engineer	39.52 50.78	3 4	42.03 56.95	37.26 69.69	37.53 54.11	44.42 59.33
Director of Inspectional Services/Building Commissioner	39.52 50.78	7 9	45.12 56.68	41.00 78.53	44.59 53.04	46.08 65.32
Director of Community Development and Planning	48.05 61.74	7 10	45.75 58.72	29.33 86.39	47.26 54.77	49.15 64.92
Chief Information Officer (city and schools) / IT Director	57.87 73.63	5 8	48.79 64.71	44.59 85.11	49.05 65.15	49.76 67.36
Director of Public Works	68.93 87.69	7 10	54.25 70.60	30.31 86.39	54.58 72.10	61.54 79.20
Director of Strategic Initiatives and Communications (Mayor's Office)	48.05 61.74	3 3	46.34 64.71	41.00 82.03	45.64 59.06	49.00 70.54
Energy Efficiency Manager <i>Benchmark</i>	28.47 31.37	2 3	32.10 41.99	29.42 45.01	32.10 41.71	33.44 43.36
Executive Assistant to City Solicitor	28.26 36.31	2 2	31.15 41.39	30.14 41.61	31.15 41.39	31.65 41.50
Executive Director - Melrose Contributory Retirement	44.40 48.91	2 3	40.71 57.97	32.37 70.88	40.71 57.30	44.88 64.09
Executive Director Melrose Memorial Hall	33.88 43.54	3 3	32.94 44.11	31.31 50.48	32.92 44.27	33.75 47.38
Executive Office Manager - Police	26.12 28.79	2 8	30.93 36.10	30.48 41.29	30.93 36.76	31.15 38.72
Event Operations Assistant - Memorial Hall	19.51 21.50	1 1	20.65 28.98	20.65 28.98	20.65 28.98	20.65 28.98

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Facilities Manager - City and Schools	45.76 58.80	4 7	51.19 63.46	44.59 86.39	50.20 59.92	55.88 68.50
Finance Manager (Auditing)	28.26 36.31	2 3	31.08 40.28	30.32 46.51	31.08 39.80	31.46 43.15
Finance Administrator - Fire Dept./Public Safety	25.67 32.99	3 3	28.31 36.27	27.30 37.93	28.74 35.44	28.81 36.68
Financial Systems Analyst/Project Manager (Auditor/IT Depts.)	39.52 50.78	4 4	43.88 57.46	31.37 68.47	46.54 57.85	50.58 62.49
Fire Chief	contract 66.27	5 8	59.39 73.94	50.53 86.39	59.78 73.87	64.96 77.58
Health Director (Melrose is regional)	61.35 78.05	6 7	36.18 47.13	23.91 59.06	36.84 46.16	39.97 53.78
Human Resources Assistant	28.47 31.37	1 2	26.44 35.63	26.44 36.27	26.44 35.63	26.44 35.95
Human Resources Director	48.05 61.74	7 10	41.82 54.86	26.71 70.88	41.67 52.30	46.82 63.17
Human Resources Benefits Coordinator	36.95 47.49	7 10	29.58 37.29	17.21 50.48	29.31 37.16	32.69 39.37
Library Director	36.59 47.02	7 10	43.20 54.50	25.35 78.53	44.59 51.81	48.06 61.83
Local Building Inspector (Certified)	40.21 44.30	4 7	33.38 40.21	31.31 50.48	33.81 40.39	34.15 42.71
Milano Center Manager (COA)	31.03 34.19	1 1	41.25 54.84	41.25 54.84	41.25 54.84	41.25 54.84
Operations Manager - DPW	39.52 50.78	4 6	42.75 51.68	39.02 58.09	43.08 51.66	44.09 56.60
Program Coordinator - MA in MotionZBA Clerk	28.47 31.37	1 1	25.38 34.09	25.38 34.09	25.38 34.09	25.38 34.09
Planning Coordinator & ZBA Clerk	24.47 26.96	3 3	23.12 29.85	18.65 34.15	22.25 30.25	25.36 32.20
Plumbing and Gas Inspector	28.47 31.37	5 7	28.83 37.37	19.95 48.02	28.46 36.23	32.93 43.49
Public Health Specialist	34.47 37.98	2 2	35.90 47.88	33.61 52.27	35.90 47.88	37.05 50.07
Program Coordinator - Tobacco/Alcohol	26.12 28.78	1 1	34.25 46.91	34.25 46.91	34.25 46.91	34.25 46.91
Project Engineer	28.26 36.31	4 6	34.67 43.86	31.68 53.61	35.35 43.05	36.27 46.60
Recreation Coordinator	26.12 28.78	7 8	25.39 31.81	17.21 48.02	24.52 28.60	28.84 33.94

POSITION TITLE	Melrose Current	Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
Recreation Director	45.76 58.80	7 9	38.00 48.96	26.71 70.88	37.77 44.90	41.29 53.07
Sealer of Weights and Measures	31.92 35.17	2 3	31.85 42.74	30.77 48.02	31.85 40.39	32.39 44.20
Senior Planner	40.21 44.30	5 7	33.29 43.64	28.01 51.27	34.43 45.01	34.78 50.19
Superintendent of Mount Hood - <i>Limited Data</i>	45.76 58.80	2 2	34.74 47.56	25.66 60.47	34.74 47.56	39.27 54.01
Superintendent of Parks	not on plan 29.12	4 5	35.20 41.90	26.71 49.77	36.21 39.80	39.53 45.02
Sustainability Manager	28.26 36.31	2 2	36.09 51.34	34.64 55.88	36.09 51.34	36.81 53.61
Systems Analyst IT (city/schools) - networks/databases	30.80 39.58	3 5	40.97 50.99	34.43 55.19	42.66 51.27	44.24 55.00
Treasurer/Collector	48.05 61.74	7 9	43.83 58.05	23.91 78.53	45.27 56.17	48.84 66.39
Veteran's Administrative Assistant/PT	19.51 21.50	1 2	31.74 36.34	31.74 42.56	31.74 36.34	31.74 39.45
Veterans Services Director (Regional Position)	39.81 43.87	6 7	28.35 37.02	19.95 47.14	28.23 36.23	31.23 42.93
Water-Sewer Administrator (Billing)	30.80 39.58	3 5	24.94 35.04	21.29 40.39	23.75 36.59	26.77 39.37
Wiring Inspector	31.92 35.17	6 8	30.87 40.27	19.95 48.02	30.70 41.93	34.32 46.41

POSITION TITLE	Melrose Current		Comp Data Points	Comp Average	Comp Lo- Hi Range	Comp Median	75th Percent of Market
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ADDITIONAL BENCHMARK DATA

Assistant Health Director		3	32.23	29.58	33.51	33.56
		3	42.27	43.49	42.16	42.82
Director - E-911		1	32.87	32.87	32.87	32.87
		1	45.59	45.59	45.59	45.59
Dispatch Center Manager		4	26.63	22.27	26.72	28.57
		5	33.24	39.85	30.93	34.97
Dispatcher/Communicator		6	22.56	20.55	21.68	22.78
		6	27.80	36.23	26.48	28.00
Diversity, Equity and Inclusion Director/Coordinator		3	42.41	36.00	37.28	45.61
		3	58.97	82.11	48.22	65.17
Emergency Management Director		1	40.13	40.13	40.13	40.13
		1	45.34	45.34	45.34	45.34
Health and Human Services Director		3	51.93	49.62	51.82	53.08
		5	64.00	78.53	65.32	70.92
Help Desk Technician		4	30.23	28.05	29.63	31.51
		5	37.64	45.02	35.82	39.85
Mental Health Clinician		3	25.60	21.46	25.46	27.67
		3	36.04	43.61	32.94	38.27
Parks Grounds Laborer (Pine Banks)		4	20.94	17.46	20.31	23.10
		4	24.80	29.90	23.42	25.39
Park Ranger		1	24.03	24.03	24.03	24.03
		1	29.96	29.96	29.96	29.96
Purchasing Director/Coordinator		5	34.52	23.91	34.58	37.28
		6	44.89	55.19	48.61	50.11
Social Worker		3	30.88	22.73	33.61	34.96
		3	43.37	53.61	43.49	48.55

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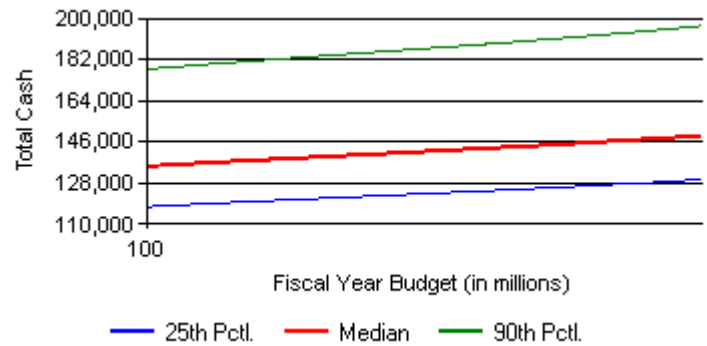
Individual Job Report

Police Chief

Specifications

Prepared For: City of Melrose, MA
Area: Massachusetts - Commonwealth Average
Industry: Government - City Support Services
Industry Codes: eSIC: 9104, NAICS: 921100, usSEC: 9721
Organization Size: 400,000,000
Education Adjustment:
Skill Adjustment:
Certification Adjustment:
Annualized Salary Trend: 2.6% (Adjustment: 0.21%)
Planning Date: 2/6/2022
Database as of: 1/1/2022
eDot: N/A
SOC: N/A
Printout Date: 2/6/2022
(Items in bold affect salary estimates)

Annual Total Cash Graph



Estimated Survey Median Annual Total Cash

All Incumbent Median: \$148,695

Fiscal Year Budget	25th Percentile	45th Percentile	Median	75th Percentile	90th Percentile
400,000,000	129,379	145,333	148,695	173,738	196,680
200,000,000	123,194	138,462	141,757	165,331	186,740
100,000,000	117,513	132,114	135,290	157,868	177,787

The Police Chief in Melrose is a contract position; therefore HRS has not placed this position on the compensation and classification plan, as the contract would prevail. Instead, HRS has provided pay range data for police chiefs in the custom market survey. However, we determined it was necessary to look at statewide composite actual rates data from municipal communities in order to discern better what police chiefs are making in 2022. The range is \$157,868 to \$173,738 at the 75th percentile. The all incumbent average is \$148,695. This is hybrid data through ERI.

Attachment: MF Attachments Sent 11.3 (ORDER-2023-29 : An Appropriation from Contract Stabilization)

SALARY ASSESSOR®

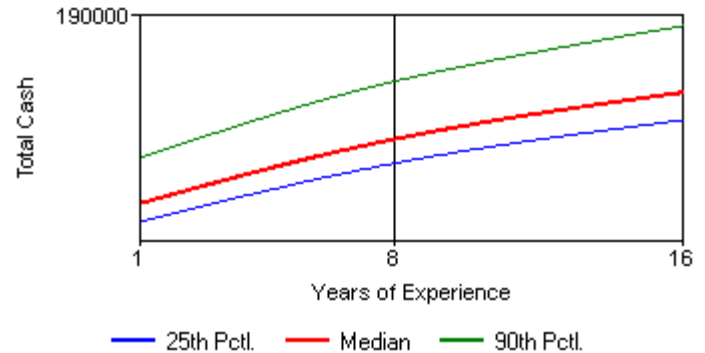
Individual Job Report

Fire Chief

Specifications

Prepared For: City of Melrose, MA
 Area: Massachusetts - Commonwealth
 Average
 Industry: Government - City Support Services
 Industry Codes: eSIC: 0000, NAICS: 000000, usSEC: 0000
 Organization Size: (Data reported by years of experience)
 Education Adjustment:
 Skill Adjustment:
 Certification Adjustment:
 Annualized Salary Trend: 2.6% (Adjustment: 0.21%)
 Planning Date: 2/6/2022
 Database as of: 1/1/2022
 eDot: N/A
 SOC: N/A
 Printout Date: 2/6/2022
 (Items in bold affect salary estimates)

Annual Total Cash Graph



Estimated Survey Median Annual Total Cash

All Incumbent Median: \$129,224

Years of Experience	25th Percentile	45th Percentile	Median	75th Percentile	90th Percentile
15	136,233	147,128	149,591	166,333	181,340
10	123,644	133,661	135,968	151,767	164,981
5	106,310	115,034	117,078	130,950	142,987

The Fire Chief in Melrose is a contract position; therefore HRS has not placed this position on the compensation and classification plan, as the contract would prevail. Instead, HRS has provided pay range data for fire chiefs in the custom market survey. However, we determined it was necessary to look at statewide composite actual rates data from municipal communities in order to discern better what fire chiefs are making in 2022. The range is \$130,950 to \$166,333 at the 75th percentile. The all incumbent average is \$129,224. This hybrid data through ERI.

Attachment: MF Attachments Sent 11.3 (ORDER-2023-29 : An Appropriation from Contract Stabilization)

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Clerk of Committees	City Council	61,151.00		600.00			61,751.00	64,461.25	3,310.25	5.4%	30.80	39.58	11	34.75	4
							-	-	-						
Communication and Community Outreach Coordinator	Mayor	65,703.00		650.00			66,353.00	70,953.75	5,250.75	8.0%	34.22	43.97	12	38.25	4
Director of Strategic Initiatives and Communications	Mayor	96,896.00		650.00			97,546.00	101,802.40	4,906.40	5.1%	48.41	53.33	19	54.88	6
Director of Economic Recovery and Business Development	Mayor	92,230.60		650.00			92,880.60	93,343.60	1,113.00	1.2%	48.05	61.74	15	44.68	5
							-	-	-						
CFO/City Auditor	Auditor	157,172.00	1,175.00	600.00	3,000.00		161,947.00	159,956.65	2,784.65	1.8%	68.93	87.69	23	75.07	8
Assistant City Auditor	Auditor	95,350.00	775.00	600.00			96,725.00	97,925.45	2,575.45	2.7%	36.95	47.49	18	52.79	6
Finance Manager	Auditor	71,481.00	775.00	600.00			72,856.00	72,604.70	1,123.70	1.6%	28.26	36.31	11	34.75	4
							-	-	-						
Chief Assessor	Assessor	93,204.00	775.00	600.00	4,347.00		98,926.00	101,802.40	8,598.40	9.2%	48.41	53.33	19	54.88	6
							-	-	-						
Treasurer/Collector	Treasurer	114,308.00		600.00	1,000.00		115,908.00	114,639.00	331.00	0.3%	48.05	61.74	19	54.88	6
Assistant Treasurer	Treasurer	77,590.00		600.00			78,190.00	77,590.00	-	0.0%	36.95	47.49	13	40.80	4
							-	-	-						
Exec. Assistant to City Solicitor	Legal	68,707.00	975.00	600.00	6,500.00	3,000.00	79,782.00	70,100.45	1,393.45	2.0%	28.26	36.31	10	31.62	3
City Solicitor - Labor Counsel	Legal	134,354.00		600.00			134,954.00	139,254.85	4,900.85	3.6%	65.03	82.73	23	75.07	8
Assistant City Solicitor	Legal	110,158.00	775.00	600.00			111,533.00	111,225.80	1,067.80	1.0%	46.21	59.38	20	57.63	6
							-	-	-						
Human Resources and Labor Relations Director	HR	107,383.00	975.00	600.00			108,958.00	116,846.45	9,463.45	8.8%	48.05	61.74	21	62.99	7
Human Resources and Benefits Coordinator	HR	74,818.00		600.00			75,418.00	75,684.00	866.00	1.2%	36.95	47.49	13	40.80	4
Human Resources Assistant	HR	54,374.00		600.00			54,974.00	55,265.00	891.00	1.6%	28.47	31.37	9	27.54	3
							-	-	-						
Director of IT City & Schools	IT	144,943.00	775.00	600.00			146,318.00	144,943.00	-	0.0%	57.87	73.63	21	62.99	7
IT Systems Analyst	IT	74,890.00	775.00	600.00			76,265.00	76,459.00	1,569.00	2.1%	30.80	39.58	13	40.80	4
Assistant IT Director	IT	93,480.00	775.00	600.00			94,855.00	94,493.70	1,013.70	1.1%	36.95	47.49	16	48.96	5
Financial Systems Analyst/Project Manager	IT	84,884.00	620.00	600.00			86,104.00	86,517.20	1,633.20	1.9%	39.52	50.78	17	50.75	6
Project/System Administrator	IT	69,101.00		600.00			69,701.00	81,935.35	12,834.35	18.6%	34.22	43.97	13	40.80	4
							-	-	-						
City Clerk	City Clerk	90,807.00	775.00	600.00	1,500.00	4,000.00	97,682.00	90,820.80	13.80	0.0%	39.52	50.78	16	48.96	5
Assistant City Clerk	City Clerk	70,158.00		600.00			70,758.00	70,158.00	-	0.0%	31.68	40.71	11	34.75	4
							-	-	-						
Senior Planner	Planning	78,348.00	775.00	600.00			79,723.00	80,321.50	1,973.50	2.5%	40.21	44.30	13	40.80	4
Director of Community Development and Planning	Planning	131,537.00	1,530.00	600.00			133,667.00	131,537.00	-	0.0%	48.05	61.74	19	54.88	6
Sustainability Manager	Planning	72,911.00	975.00	600.00			74,486.00	75,684.00	2,773.00	3.8%	28.26	36.31	13	40.80	4
							-	-	-						
Admin. Accounting Assistant	Police	19,561.00					19,561.00	19,949.00	388.00	2.0%	19.51	21.50	8	20.91	2
Executive Office Manager Police	Police	55,541.00	775.00	600.00			56,916.00	64,810.20	9,269.20	16.7%	26.12	28.79	10	31.62	3

Attachment: MF Attachments Sent 11.3 (ORDER-2023-29 : An Appropriation from Contract Stabilization)

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Chief	Police	145,988.00			3,000.00			145,988.00	-	0.0%					
							-		-						
Chief	Fire	142,803.00	2,500.00	600.00			145,903.00	153,888.00	11,085.00	7.8%					
Finance Administrator - Fire Dept	Fire	50,816.00		600.00			51,416.00	57,548.40	6,732.40	13.2%	26.12	28.78	10	31.62	3
Emergency Management Director	Emergency Management	28,620.00					28,620.00	36,490.50	7,870.50	27.5%			12	38.25	4
							-		-						
Assistant to the Director of Inspectional Services	Inspectional Services	61,457.00		600.00			62,057.00	61,457.00	-	0.0%	25.93	33.32	10	31.62	3
Director of Inspectional Services/Building Commissioner	Inspectional Services	105,190.00		600.00			105,790.00	105,190.00	-	0.0%	39.52	50.78	19	54.88	6
Sealer of Weights & Measures/Wire Inspector	Inspectional Services	49,629.00		410.00			50,039.00	56,763.00	7,134.00	14.4%	31.92	35.17	12	38.25	4
Plumbing and Gas Inspector	Inspectional Services	45,058.00		410.00			45,468.00	48,654.00	3,596.00	8.0%	28.47	31.37	12	38.25	4
Local Building Inspector	Inspectional Services	64,452.00		600.00			65,052.00	65,206.96	754.96	1.2%	40.21	44.30	12	38.25	4
							-		-						
Project Engineer	DPW-Admin	65,269.00		600.00			65,869.00	81,090.00	15,821.00	24.2%	28.26	36.31	12	38.25	4
Operations Manager	DPW-Admin	109,201.20	975.00	600.00			110,776.20	111,914.80	2,713.60	2.5%	51.51	66.19	18	52.79	6
City Engineer	DPW-Admin	112,853.00	-	600.00	1,000.00		114,453.00	116,345.60	3,492.60	3.1%	45.76	58.80	19	54.88	6
DPW Director	DPW-Admin	143,014.00	775.00	600.00	1,000.00		145,389.00	142,037.35	(976.65)	-0.7%	68.93	87.69	23	75.07	8
Building Systems Supervisor (HVAC)	DPW-Admin	83,775.00	775.00	600.00			85,150.00	86,496.00	2,721.00	3.2%	34.47	37.98	13	40.80	4
Facilities Manager (City & School)	DPW-Admin	111,794.00		600.00	1,000.00		113,394.00	111,914.80	120.80	0.1%	45.76	58.80	18	52.79	6
Assistant Director DPW Administration and Finance	DPW-Admin	119,936.00		600.00			120,536.00	123,677.60	3,741.60	3.1%	52.02	66.84	19	54.88	6
Deputy City Engineer	DPW-Admin	100,831.00	-	600.00			101,431.00	107,590.00	6,759.00	6.7%	39.52	50.78	17	50.75	6
Cemetery Administrator	DPW-Admin	48,078.00	554.00	429.00			49,061.00	50,681.25	2,603.25	5.4%	31.03	34.19	12	38.25	4
							-		-						
Health Director (regional)*	Health	116,936.00		600.00			117,536.00	150,000.00	33,064.00	28.3%	61.35	78.05	19*	54.88	6
Public Health Specialist	Health	67,615.00		600.00			68,215.00	67,615.00	-	0.0%	34.47	37.98	11	34.75	4
Animal Control Officer	Health	25,686.00		-			25,686.00	25,686.00	-	0.0%	24.47	26.96	9	27.54	3
Program Coordinator - Tobacco/Alcohol	Health	65,538.21	775.00	600.00			66,913.21	65,741.20	202.99	0.3%	26.12	28.78	9	27.54	3
Prevention and Wellness Program Coordinator	Health	56,191.71	666.50	516.00			57,374.21	52,326.90	(3,864.81)	-6.9%	34.47	37.98	9	27.54	3
							-		-						
Milano Center Manager (COA)	COA	58,287.00		600.00			58,887.00	58,695.00	408.00	0.7%	31.03	34.19	10	31.62	3
Council on Aging Director	COA	90,921.00		600.00			91,521.00	97,925.45	7,004.45	7.7%	48.41	53.33	18	52.79	6
							-		-						
Veterans Service Director (Regional)	Veterans	78,448.00		600.00			79,048.00	79,468.20	1,020.20	1.3%	39.81	43.87	14	42.84	5

Attachment: MF Attachments Sent 11.3 (ORDER-2023-29 : An Appropriation from Contract Stabilization)

Position	Department	Fiscal 2023 Budgeted Base Salary Based on 53 week Payroll budget	Longevity	Potential Maximum SLBB	Stipend 1	Stipend 2	Total Potential Salary inclusive Longevity/SLBB/St ipends	New Salary Based on 53 week Payroll Budget	Estimated Comp Adjustment Base Only	Estimated Percent Adjustment Base only	FY22 Base Hourly MIN	FY22 Base Hourly MAX	New Proposed Grade	Proposed FY23 Hourly MIN	Propo F Ho N
Administrative Assistant PT	Veterans	19,546.00					19,546.00	19,948.00	402.00	2.1%	19.51	21.50	8	20.91	2
							-		-						
Library Director	Library	99,296.00	1,530.00	600.00			101,426.00	108,035.20	8,739.20	8.8%	36.59	47.02	19	54.88	6
Assistant Library Director (Head Technical Services)	Library	84,266.00	2,500.00	600.00			87,366.00	85,237.25	971.25	1.2%	36.95	47.49	13	40.80	4
							-		-						
Recreation Director	Recreation	99,079.00	975.00	600.00			100,654.00	97,944.00	(1,135.00)	-1.1%	45.76	58.80	17	50.75	6
Recreation Coordinator	Recreation	48,454.00		600.00			49,054.00	53,145.75	4,691.75	9.7%	26.12	28.78	9	27.54	3
Executive Director Melrose Memorial Hall	Memorial Hall	87,418.00	975.00	600.00			88,993.00	90,820.80	3,402.80	3.9%	33.88	43.54	16	48.96	5
Events Operation Manager Memorial Hall	Memorial Hall	18,824.00					18,824.00	19,948.14	1,124.14	6.0%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	20,335.00					20,335.00	20,521.90	186.90	0.9%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	18,776.00					18,776.00	19,571.76	795.76	4.2%	19.51	21.50	8	20.91	2
Events Operation Manager Memorial Hall	Memorial Hall	5,255.00					5,255.00	5,541.15	286.15	5.4%	19.51	21.50	8	20.91	2
							-		-						
Water-Sewer Administrator Billing	Sewer	73,422.00	775.00	600.00			74,797.00	75,313.00	1,891.00	2.6%	30.80	39.58	12	38.25	4
									-						
Superintendent of Parks	Mt Hood/Parks	99,080.00	1,175.00	600.00			100,855.00	97,944.00	(1,136.00)	-1.1%	45.76	58.80	17	50.75	6
							-		-						
Executive Director - Melrose Contributory Retirement	Retirement	121,178.14	775.00	600.00			122,553.14	117,031.95	(4,146.19)	-3.4%	44.40	48.91	18	52.79	6
							-								
							Total Adjustment		217,034.75						

1. Fiscal 2023 is based on a 53 week Payroll Budget.

2. Please note this chart was prepared to demonstrate total compensation for employees **inclusive of** longevity, potential SLBB and Stipends and to show the proposed monetary change by position.

3. The funding request of \$167,309.63 Council Order 2023-29 represents the budgetary impact of these adjustments **and takes into consideration any departmental changes since the budget was approved in June 2022.**

(such changes are due to regionalization pending Council approval, staffing changes, vacancies, temporary out of grade assignments to cover for leaves)

4. The funding order doesn't reflect the total adjustment since certain positions are funded through ARPA, grants, regional budgets and other sources and they have absorbed a portion of the adjustment.

5. The Health Director proposed grade is representative of the proposed salary prior to the regionalization with Stoneham, which is pending approval of Council.

6. 21 of the positions have outgrown the current salary schedule and receive only COLA, without any steps.

7. Few positions have a base salary that is higher than the proposed hourly maximum, their salary will not be reduced, and will only be eligible for COLA going forward.

8. A negative percent adjustment reflects a slower salary progression than the current plan.

9. Report produced 11/3/22 by the Auditor and HR depts.

Questions Received from Councilors regarding Compensation Study and CBA Orders

1. Provide a 10-year history of all approved withdrawals from the contract stabilization account and indication of what was approved (e.g., in X year the council approved Y amount to go toward funding retro raises for Z collective bargaining agreement).

Please see attached Stabilization History.

2. Provide a copy of the compensation study completed by the consultant any related documents-Please see attached Compensation and Classification plan documents.

3. Provide a list of any identified non-union positions that are currently identified for a compensation adjustment under order 2023-29 to maintain compliance with the MA Equal Pay Act.

The Mass Equal Pay Act requires that employees performing equal or comparable work are compensated equally. "Equal work" involves similar skill and responsibilities and is performed in similar working conditions. The methodology HRS used involves the components required by MEPA and by creating one consolidated compensation plan and a classification plan it ensures that the pay equity matches the MEPA requirements. It is hard to isolate which positions require adjustments solely related to MEPA compliance. The Comp and Class study HRS conducted is different from a pay equity study, disparity study or gender analysis, all of which involve a deeper analysis of compliance with the Mass Equal Pay Act. The Comp and Class study focuses on the positions themselves not the employees in the positions, which is what a pay equity study does, as it takes into consideration the individual longevity, personal qualifications, the education/ training and the performance of the individual employees. The Comp and Class study has built the elements of MEPA into its methodology, job analysis, job evaluation, along with external market analysis, which sets the foundation of a system that is externally and internally equitable.

4. List of all positions by job title and department slated to be adjusted under the 2023-29 funding request. For these positions, total current annual compensation, inclusive of stipends, COLAs, and any other monetary compensation paid out of all City funds (operating and enterprise).

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22".

5. Orders 2023-30 and 2023-31 reference that the funding request is for FY 23 funding for a union contract.

- When was this contract settled?

The MOUs were executed September 23, 2022 (Clerical) and October 4, 2022 (Laborers).

- Are these raises retro to the start of the fiscal year?

The previous contracts expired at the end of FY22. The new contracts are effective with the start of FY23, therefore the budgeted raises are retro to the start of the fiscal year.

- Were any of these raises budgeted for in the current FY 23 budget, or is the totality of the increases being absorbed through the stabilization and retained earnings fund?

As is the customary budgeted practice, any FY23 step increases were budgeted based on the old contract, which was the known amount when FY23 budget was set. The stabilization fund absorbs only partially increases.

6. What is the stated purpose for the contract stabilization, water retained earnings, and sewer retained earnings funds? Is this stated purpose set by: state statute/charter/city admin/all of the above? The "Contractual Obligations and Salary & Wages Stabilization Fund" was established in 2006 by Council Vote 06-221 and in accordance with MGL Chapter 40, Section 5B. Water Retained Earnings and Sewer retained earnings were established under MGL Chapter 44, Section 53F ½ for Enterprise Funds.

7. What is the City relying on to justify paying non-union comp adjustments from the contract stabilization fund?

The stabilization fund was created for the purposes of contractual obligations as well as salary and wages. The adjustments resulting from the Comp and Class study are one-time non-budgeted salary adjustments, therefore the stabilization fund is used to fund part of these adjustments.

8. Did the classification review the compensation for both full time and part time employees? Among the positions reviewed we have both full time and part time employees.

9. Can you provide what positions have other compensation and what are the "Other" items? Under "other compensation" we consider stipends, longevity, sick leave incentives.

Below are the positions receiving a stipend (see list below, amount of stipend and reason for it).

Position	Stipend Position	Stipend Amount
Exec. Legal Assistant	Liquor Commission	\$6,500.00
Exec. Legal Assistant	Retirement Board	\$3,000.00
CFO/Auditor	Retirement Board	\$3,000.00
City Clerk	Clerk/City Council	\$4,000.00
City Clerk	Board of Registrars	\$1,500.00
Police Chief	Retirement Board	\$3,000.00
Assessor	Board of Assessor	\$4,347.00
Treasurer	Retirement Board (working with)	\$1,000.00
DPW Director	job specific licenses	\$1,000.00
Deputy City Engineer	job specific licenses	\$1,000.00
City Engineer	job specific licenses	\$1,000.00

Longevity is an annual bonus that benefit eligible non-union employees receive based on continuous years of service with the City, following the schedule below:

Years of Continuous Service	Annual Lump Sum Compensation
5 years, but less than ten 10 years	\$ 775.00
10 years, but less than 15 years	\$ 975.00
15 years, but less than 20 years	\$ 1,175.00
20 years, but less than 25 years	\$1,530.00
25 years, but less than 29 years	\$1,950.00
29 years or more	\$2,500.00

Non-union benefit eligible employees are reimbursed earned unused sick time in accordance with the schedule below. The maximum reimbursement they are eligible for per year is \$650.

If employee uses:	Less than 24.9% of available sick days (0 to 2.9 days/0 to 20.9 hours)	Receives \$50.00/day for remaining unused days
	between 25% - 49.9% of available sick days (3 to 5.9 days/21 to 41.9 hours)	Receives \$40.00/day for remaining unused days
	between 50% -74.9% of available sick days (6 to 8.9 days/42 to 62.9 hours)	Receives \$30.00/day for remaining unused days.
	75% or more (9 to 12 days/63 to 84 hours)	Zero reimbursement
In all instances, the applicable percentages shall be rounded down.		

10. Please provide by position side by side the old min and max salary and the new min and max salary.

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22"

11. Please provide by position the dollar increase along with the percentage.

See attached spreadsheet/PDF "CompClassOrderDocument11-3-22"

12. You state in your memo that periodically we should do a cost of living increase in the compensation structure. How do you define periodically?

This is a discretionary decision of the Mayor and the CFO. Depending on the economy, employers are advised to apply COLA to their compensation plan to ensure that the pay is still appropriate, competitive with the changing economy and not stagnant. Union employees have COLA applied to the comp plans every year.

13. If an employee is above the range how will their annually compensation work every year?
They will only receive COLA going forward.

14. Are there any collective bargaining units within the City (including those under MPS) that are not eligible to access the contract stabilization fund? If so, why? There are no CBAs that are restricted from using the Contractual Obligations and Salary & Wages Stabilization Fund.

Ghobrial, Andrew

From: Maryandjoe Pelrine <[REDACTED]>
Sent: Monday, November 7, 2022 10:20 AM
To: City Council
Subject: Tonights meeting

Good Morning All,
 What a beautiful day!
 I am not sure if I can attend tonight.
 On these orders

2023-29 funding for HRS compensation study. I thought that this study was completed already.
 Why is a total of \$ 7534.00 coming out of W & S retained earnings to pay for this?

2023-30 Funding for the clerical union contractual This time W & S retained earnings is being
 tapped for \$ 8792.00. Why wouldn't this line be covered entirely by the contract stabilization account?

2023-31 Funding for the labor's union contract. This time the W & S retained earning is being
 tapped for \$ 18,294.00. Again why isn't the contract stabilization account covering all of this?

Total \$ 34,620.00 is a lot of money.
 How did the city come to these percentage totals for each of these items?

It would seem to me that when the budget was approved, each of these line lines were accounted
 for, and funded, and now more money needs to be allocated?

With all of our water bills through the ceiling, How is that there \$34,620.00 in these retained earning
 accounts? Are we being charged to much for W & S?
 What are retained earning accounts?

Thanks for all you do for the City of Melrose.

Joe

****CITY OF MELROSE PUBLIC RECORDS NOTICE: Please be advised that the Massachusetts Attorney General has
 determined that email is a public record unless the content of the email falls within one of the stated exemptions under
 the Massachusetts Public Records Laws.****

Attachment: Pelrine_Redacted (ORDER-2023-29 : An Appropriation from Contract Stabilization)

Ghobrial, Andrew

From: Alison Sarnoski <[REDACTED]@melrosema.gov>
Sent: Monday, November 7, 2022 6:06 PM
To: City Council; School Committee
Subject: Teacher contract

Good evening elected officials,
 I apologize for the lateness of this email. I understand the scope of both of your roles, but as our representatives, I ask that you consider this as both leaders and neighbors. I ask that you figure out a way to settle the MPS teacher and para contract. I understand that we don't know all of the updated MPS FY23 budget projections, but I feel like we can all agree that we will likely have a significant shortfall. We don't have to wait. We will need to be creative and we need to solve the problem now. This district cannot afford a strike. Essential workers in general and educators, specifically, have found their voices. I used to think that you might be able to try to "be creative" and bargain for things that don't cost money, but the reality is, we can't stand to lose anything. Money settles contracts. Settled contracts in our area give an indication that it's going to take a significant investment. Even if it's not "best financial practice," find money to settle this contract so that relationships can be repaired and there can be a partnership to lead this district forward through what is likely going to be a difficult few years.

There is an order before the Council tonight to adjust non-union salaries based on the results of the HR study. While I question the timing of this proposal, I don't disagree with its merit. Melrose should pay its employees at a competitive rate. The request states that, "The pay ranges targeted the 75th percentile of market, which was necessary in order to remain competitive as compared to other municipalities in Massachusetts." This is great. Pay our teachers and paras enough so that we're not in the bottom 10%. It's embarrassing. Also, I would ask that the School Committee and Superintendent rethink its language around the settlement of the contract. The word, "fair," is being used a lot. There really isn't a number that Melrose will get to this year that is "fair." We can do our best. It won't be fair. And words matter.

Council members, please don't sit back and say, "well, no one has asked us." School committee, please don't say "we just don't know how much money we are working with." Choose to work together to solve this problem. We desperately need leadership in this city. Please come up with a plan to articulate what it is that Melrose needs and how we are going to get there, or implore the Mayor to. Hundreds of Melrose residents came together in 2019 to volunteer their time to be a part of a vision for this city. Many are waiting for a clear articulation of what we need and how we will get there. Please tell us.

Sincerely,
 Alison Sarnoski



ReplyForw

****CITY OF MELROSE PUBLIC RECORDS NOTICE: Please be advised that the Massachusetts Attorney General has determined that email is a public record unless the content of the email falls within one of the stated exemptions under the Massachusetts Public Records Laws.****

Comp and Class Study Results

Funding Request for
Non-Union Salary Adjustments

HRS Introductions

- **Aleksandra (Sandy) E. Stapczynski**- President HRS Inc; 35+ Years Consulting Experience
- **Buzz Stapczynski** – Served as CEO of large Municipality for many years
- **Tony Torrisi** – 40+ Years in Municipal Finance
- **Barbara Wooten** – Served as Assistant CHRO for the entire Commonwealth

Why did the City need to do a Comp and Class Study?

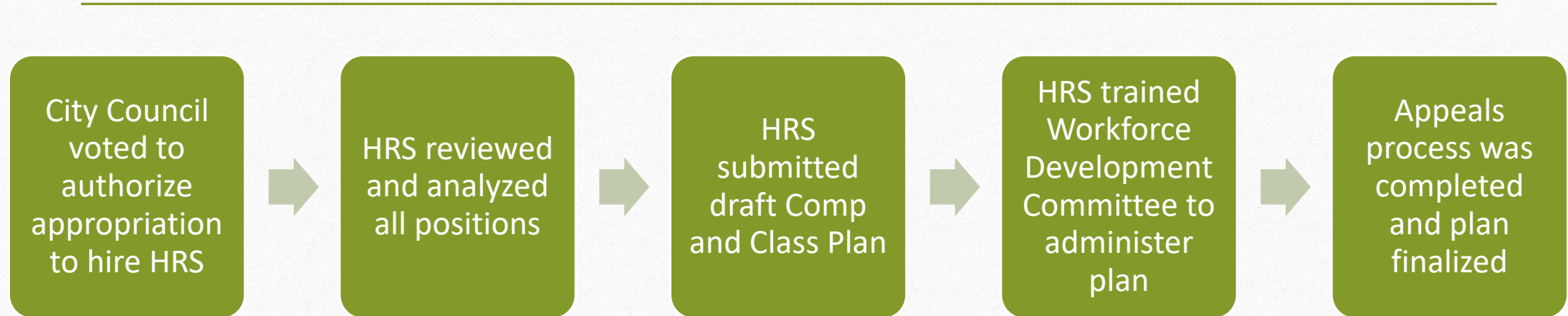
- Maintaining and regularly updating a Compensation and Classification Plan is a STANDARD BEST PRACTICE for municipalities
- Study usually done every 3-5 years
- The City of Melrose last did a comprehensive study of our salary plan over 30 years ago
- Our existing salary plan is obsolete and inequitable

Investing in our classification and compensation infrastructure is investing in the City of Melrose as an employer and investing in our career workforce.

Comp and Class Study Goal

Developing, supporting, and maintaining a **fair and equitable** classification and compensation system, including updated job descriptions, for City of Melrose non-union positions.

Study Timeline



OUR SYSTEM TODAY

PROPOSED SYSTEM

Static compensation system,
not updated regularly.

**Updated compensation plan reflective of
marketplace, internal job values and City's
desire to attract and retain talent**

2 Tiers; 6 schedules;
100+ grades

1 salary schedule with 23 grades

Inconsistent step increases
ranging from 1.25% - 3.5%

2% between steps

One third of non-union
workforce not on a salary
schedule, receiving COLA only

**Places workforce on a salary plan, allowing
for a meaningful career progression and
retention**

OUR SYSTEM TODAY

No established minimum and maximum salary ranges that apply to current job market.

No formal job classification plan.

No system of classifying new positions.

PROPOSED SYSTEM

Provides established minimum and maximum salary ranges.

One classification plan built on tested methodology, provides pay equity and clear hierarchy based on skill and job requirements.

Offers modern blueprint based on transparent and objective standards when evaluating new positions.

OUR SYSTEM TODAY

PROPOSED SYSTEM

Pay decisions are made in a vacuum.

Provides fair and equitable approach to pay decisions and reduces subjectivity.

Non-compliant with MEPA (various tiers based on hire dates, lack of consistency).

Ensures internal equity and compliance with MEPA.

Formal FLSA review has not been conducted to ensure FLSA compliance.

FLSA status evaluation ensure properly classifying positions as Exempt/ Non-exempt.

OUR SYSTEM TODAY

PROPOSED SYSTEM

Job descriptions have not been formally tested for compliance with state and federal laws.

Thorough analysis of the job description establishes legal compliance with state and federal laws.

Salary is stated as primary reason for leaving employment with the City.

Competitive salary schedule based on 75% of market averages to attract and retain talented diverse workforce.

Doesn't align with the City's goals and values of Diversity, Equity and Inclusion.

Supports the City's values and efforts towards Diversity, Equity and Inclusion.

Risks v. Rewards

There are **RISKS** if the plan is not implemented:

- Current plan is not consistent or fair
- Legal exposure
- Harder to recruit and retain talented employees

There are **REWARDS** if the plan is implemented:

- ✓ Ongoing compliance & strategic compensation planning
- ✓ Would support a hybrid performance-based appraisal system
- ✓ Improves morale 😊

Objectives Met

Classification and Compensation Plan development and maintenance provides the City with internal and external equity based on these criteria:

- ✓ Knowledge, ability, skills
- ✓ Education, training, and experience required
- ✓ Market data analysis
- ✓ Job duties and responsibilities

HRS provided necessary training to allow the City to maintain the plans going forward.

HRS Study Outcomes

- Compensation and Classification Study results in adjustments to 58 positions
- Not every adjustment exceeds existing departmental budget
- Some salaries are paid through other sources, including regionalized and grant-funded positions

Why are We Here Now?

- The study results are complete and ready to implement
- Request for \$167,310 from the Contractual Obligations and Salary & Wages Stabilization Fund to fund the study results for current FY
- City Council approved free cash appropriation of \$460,000 to fund in part non-union salary adjustments (May 2022)
- CFO and department heads preparing to build the FY24 budget

Questions?