

ATTACHMENT A

MODULE 4 – SCHEMATIC DESIGN REVIEW COMMENTS

District: Town of Needham
School: Pollard Middle School
Owner's Project Manager: Henry Haff, Town of Needham with Li-Ro Hill
Designer Firm: HMFH Architects, Inc.
Submittal Due Date: June 25, 2026
Submittal Received Date: June 25, 2026
Review Date: June 25, 2026 – July 27, 2026
Reviewed by: O. Lynch, E. Udy, V. Dagkalakou, C. Forde, C. Alles

MSBA REVIEW COMMENTS

The following comments¹ on the Schematic Design (“SD”) submittal are issued pursuant to a review of the project submittal document for the new construction of the proposed project and presented as a Schematic Design submission in accordance with the MSBA Module 4 Guidelines.

4.1 SCHEMATIC DESIGN SUBMITTAL

Overview of the Schematic Design Submittal	Complete	Provided; <i>Refer to comments following each section</i>	Not Provided; <i>Refer to comments following each section</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
Schematic Design Submittal Notification	☒	☐	☐	☐
OPM Certification of Completeness and Conformity	☒	☐	☐	☐
4.1.1 DESE Submittal	☐	☒	☐	☐
4.1.2 Schematic Design Binder	☐	☒	☐	☐
4.1.3 Schematic Design Project Manual	☐	☒	☐	☐
4.1.4 Schematic Design Drawings	☐	☒	☐	☐

Note that Module Four states that “MSBA will not accept incomplete submittals, submittals that have not been reviewed by the OPM or submittals for which the estimated project costs exceed the District's project budget. Updates to the Total Project Budget that do not reflect the scope and schedule represented in the Schematic Design submittal will not be accepted. All value engineering activities must be complete, and the results incorporated into the Schematic Design documentation prior to being submitted to the MSBA.”

¹ The written comments provided by the MSBA are solely for purposes of determining whether the submittal documents, analysis process, proposed planning concept and any other design documents submitted for MSBA review appear consistent with the MSBA's guidelines and requirements, and are not for the purpose of determining whether the proposed design and its process may meet any legal requirements imposed by federal, state or local law, including, but not limited to, zoning ordinances and by-laws, environmental regulations, building codes, sanitary codes, safety codes and public procurement laws or for the purpose of determining whether the proposed design and process meet any applicable professional standard of care or any other standard of care. Project designers are obligated to implement detailed planning and technical review procedures to effect coordination of design criteria, buildability, and technical adequacy of project concepts. Each city, town and regional school district shall be solely responsible for ensuring that its project development concepts comply with all applicable provisions of federal, state, and local law. The MSBA recommends that each city, town and regional school district have its legal counsel review its development process and subsequent bid documents to ensure that it is in compliance with all provisions of federal, state and local law, prior to bidding. The MSBA shall not be responsible for any legal fees or costs of any kind that may be incurred by a city, town or regional school district in relation to MSBA requirements or the preparation and review of the project's planning process or plans and specifications.

4.1.1 DESE SUBMISSION

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
1	Cover Letter	☒	☐	☐	☐
2	Special Education Delivery Methodology Letter	☒	☐	☐	☐
3	Signed Educational Space Summary	☐	☒	☐	☐
4	Floor Plans	☐	☒	☐	☐
5	Special Education Adjacency Table	☐	☒	☐	☐

MSBA Review Comments:

3, 4, 5) Subsequent to receiving the submittal, the MSBA requested revisions to the Department of Elementary and Secondary Education ("DESE") submittal. Upon receipt of the revised information received on July 10, 2026, the MSBA forwarded to DESE for review and approval.

No further review comments for this section.

4.1.2 SCHEMATIC DESIGN BINDER

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response <i>To be filled out by MSBA Staff</i>
1	Introduction				
	a) Summary of the MSBA approved Preferred Schematic	☒	☐	☐	☐
	b) Community outreach overview	☒	☐	☐	☐
	c) The District's Total Project Budget for the proposed project	☒	☐	☐	☐
	d) Updated description of the project	☒	☐	☐	☐
	e) Site Plan, Floor Plans, and Elevations	☒	☐	☐	☐
	f) A copy of the MSBA Preferred Schematic Report review and corresponding District response	☒	☐	☐	☐
2	Final Design Program				
	a) General and specific architectural characteristics desired	☒	☐	☐	☐
	b) Educational space summary spreadsheets	☐	☒	☐	☐
	c) Narrative of how the proposed educational space summary supports the educational program	☒	☐	☐	☐
	d) Instructional technology (existing and proposed)	☒	☐	☐	☐
	e) Functional relationships and critical adjacencies that informed the basis of design	☒	☐	☐	☐
	f) Security and visual access requirements	☐	☒	☐	☐

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response <i>To be filled out by MSBA Staff</i>
	g) Site development requirements	☐	☒	☐	☐
	h) Description of desired features of the school	☐	☐	☒	☐
3	Traffic Analysis	☐	☒	☐	☐
4	State Site Permit Tracking Worksheet	☐	☒	☐	☐
5	Updated site vulnerability risk assessment evaluation for the selected site including a description of specific identified site resiliency concerns, design mitigation options and resulting design decisions by the District	☒	☐	☐	☐
6	Environmental and Existing Building Assessment	☒	☐	☐	☐
7	Geotechnical and Geo-environmental Analysis	☐	☒	☐	☐
8	Code Analysis and List of Permitting and other Regulatory Filing Requirements	☐	☒	☐	☐
9	Utility Analysis and Soils Analysis for on-site septic/sewage treatment facilities	☒	☐	☐	☐
10	Massing Study	☒	☐	☐	☐
11	Narrative Building Systems Descriptions				
	a) Sustainable design elements	☒	☐	☐	☐
	b) Building structure	☒	☐	☐	☐
	c) Plumbing and HVAC	☒	☐	☐	☐
	d) Fire Protection	☒	☐	☐	☐
	e) Verify adequate water capacity for new system	☒	☐	☐	☐
	f) Confirm if a fire pump will be required	☒	☐	☐	☐
	g) Electrical	☒	☐	☐	☐
	h) Information Technology	☒	☐	☐	☐
12	Sustainable Building Design Guideline Documents	☐	☒	☐	☐
13	Analysis of the design's compliance with ADA and the MAAB	☒	☐	☐	☐
14	Timeline associated with filing the Project Notification Form with Massachusetts Historical Commission ("MHC") and obtaining MHC approval prior to construction bids.	☐	☒	☐	☐
15	Room Data Sheets	☐	☒	☐	☐
16	Proposed construction methodology (DBB / CMR)	☒	☐	☐	☐
17	District's anticipated reimbursement rate w/ incentive points	☐	☒	☐	☐
18	Total Project Budget spreadsheet and summary of cost reconciliation of the Designer's and OPM's estimates.	☐	☒	☐	☐

Provide the following Items		Complete; No response required	Provided; District's response required	Not Provided; District's response required	Receipt of District's Response To be filled out by MSBA Staff
19	Sources of Other Funding Form	☒	☐	☐	☐
20	Designer's Construction Cost Estimate	☒	☐	☐	☐
21	Independent OPM Construction Cost Estimate	☒	☐	☐	☐
22	Updated Project Work Plan – indicating changes	☒	☐	☐	☐
	a) Project Directory	☒	☐	☐	☐
	b) Roles and Responsibilities	☒	☐	☐	☐
	c) Communications and Document Control Procedures	☒	☐	☐	☐
	d) Designer's Work Plan Project Schedule	☐	☒	☐	☐
23	Local Actions and Approvals Certification				
	a) Completed and signed certification	☒	☐	☐	☐
	b) SBC meeting dates, agendas, and attendees	☒	☐	☐	☐
	c) Certified SBC meeting notes with vote language and vote results	☐	☒	☐	☐
	d) Description of materials presented at such SBC meetings and where those materials may be viewed	☒	☐	☐	☐

MSBA Review Comments:

2b) Please refer to detailed comments in 'Attachment B'.

2f) The information provided on page 221 under 'Security and Visual Access' section of the submittal indicates that a meeting was held on April 28, 2026, to introduce the project and review the District's emergency response and security procedures with representatives from both the local Police and Fire Departments, however, it does not address if emergency medical personnel have been involved in the planning process. In response to these review comments, confirm whether emergency medical personnel have been consulted and will continue to be included in the planning process, and associated requirements have been incorporated into the design. Also, please confirm that first-responding personnel will continue to be consulted in the planning process.

Additionally, the information provided regarding safety and security measures identified several recommendations. In response to these review comments, please confirm that the budget accurately reflects all costs associated with safety and security measures. Please note and acknowledge that all cost increases subsequent to a Project Scope and Budget Approval from the MSBA's Board of Directors will be the sole responsibility of the District and considered ineligible for reimbursement.

2g) The information provided on page 222 under 'Site Development Requirements' states:

"Prior to the construction of Phase 1, and as part of an early bid package, a geothermal wellfield will be installed on the adjacent DeFazio site. Upon completion of the wellfield installation, the area will be utilized for construction parking and a partial lay-down area."

Once the project is completed this entire DeFazio site area will be returned to its original condition.”

As part of previous review comments, the MSBA requested additional information from the District regarding any upgrades to the tunnel under the railroad tracks and the installation of the geothermal wells at the DeFazio Field. The Design team responded that this information will be provided during the schematic design phase.

Based on the limited information provided in the schematic design documents and information received subsequent to receiving the schematic design submittal, it is understood that the scope of work includes improvement to the walking surface of the pedestrian tunnel leading to Defazio Field and the installation of geothermal piping mains below the pedestrian tunnel grade located underneath the existing MBTA railroad tracks. In response to these review comments, and for record purposes, please provide a detailed analysis that describes the collective work proposed within and adjacent to the existing pedestrian tunnel and summary analysis supporting the proposed geothermal well field locations, the anticipated timeline for coordination with the MBTA, and documentation of any discussions with the MBTA that identify the requirements for installing the geothermal piping beneath the MBTA tunnel to connect the well field to the building.

Additionally, in response to these review comments, please provide an updated project schedule that includes dates and anticipated approval for licensing for installing geothermal wells at the adjacent DeFazio site.

Also, please note and acknowledge that all cost increases subsequent to a Project Scope and Budget Approval from the MSBA’s Board of Directors will be the sole responsibility of the District and considered ineligible for reimbursement.

Furthermore, in response to these review comments, please include information that describes the process of including those involved in maintaining the site in making decisions associated with site improvement components such as landscape features, trees, planting, irrigation etc. The MSBA encourages the District to include facilities and maintenance personnel responsible for the future care and maintenance of the site in an effort to understand the time, care, and resources required to maintain the intended site features. Please acknowledge.

Moreover, the information provided in the ‘Draft Logistics Plan’ on page 1028-1035 identifies a 25-foot buffer along the east edge of the site but does not depict the buffer along the northwest edge of the site adjacent to residential properties. This buffer is shown on the architectural plans and is labeled as a “transitional area”. In response to these review comments, please coordinate the floor plans between consultants to ensure the proposed buffer areas are shown consistently across the project documents.

2h) A description of desired features of the school was not provided in the Schematic Design submittal. In response to these review comments, please provide this information.

3) The information provided on page 239 states:

“The decision to use the school driveway on Dedham Avenue as a bus enter only driveway was a temporary one-year approval while the Newman Elementary School was being renovated and the students were relocated to the Pollard Middle School site. The school

driveway was supposed to be used for emergency access only after the Newman Elementary School students were no longer at the Pollard Middle School site.”

In response to these review comments, please describe any additional approvals or agreements that allow continued vehicular/bus entrance at this driveway. If none, please describe any efforts that are planned to update the temporary access.

In addition, the information provided on page 242 recommends the following:

“Since Dedham Avenue is a state road, it is recommended to request to MassDOT the installation of a school zone on Dedham Avenue in the vicinity of the school driveway, since there were students observed walking and biking to and from the school using the driveway. The crosswalk across Dedham Avenue at George Aggott Road should also be considered for inclusion within the school zone.”

In response to these review comments, please indicate if there are plans to pursue these recommendations through MassDOT.

4) The State Site Permit Tracking Worksheet provided with the submittal was missing the Filing dates or Expected Response date and the Engineer’s signature; however, this information was subsequently submitted to the MSBA electronically on July 10, 2026. No response required.

7) The information provided on page 363 under the ‘Geophysical Survey Results’ provided by Atlantic Geoservices states:

“Results of the geophysical survey are as follows:

- AGS detected a 33’ x ~11’ excavation-style GPR anomaly. Former likely oil supply lines were also detected and marked between the building and the excavation.*
- Private water, sanitary sewer, and storm sewer utilities in the vicinity of the excavation-style anomaly were detected and marked.”*

In response to the review comments, please clarify if additional testing is scheduled to confirm the conditions of soil around the anomalies. Additionally, please confirm that the recommendations and/or potential impacts are represented in the proposed scope of work and accurately accounted for in the cost estimates.

Additionally, the information provided in the District’s response to the MSBA’s PSR review comments, stated: “A geothermal test well will be installed during the Design Development phase.” In response to these review comments, please provide a timeline associated with the work described above and include it in the overall project schedule. Please acknowledge and confirm that the estimated exploration costs are accurately represented in the total project budget spreadsheet.

Furthermore, the information provided on page 119 states:

“Sound and vibration monitoring were installed on February 18, 2026. They will be left in place for approximately two weeks. A report is expected to be complete by the end of March.”

In response to these review comments, please provide the report described above and provide a timeline associated with any additional acoustic testing to address noise from the proximity to the

MBTA tracks. Also, please clarify any impacts affecting the design, such as needing to design the school structure or windows to reduce vibration from the MBTA.

Furthermore, the information provided on page 448 as part of the Geotechnical Report by McPhail Associates, LLC states the following recommendations:

“It is recommended for McPhail be retained to perform a final subsurface exploration program and prepare an FGER. The purpose would be to confirm the anticipated scope and location of construction, subsurface conditions, and prepare final foundation recommendations. Additional subsurface explorations consisting of test pits and borings within the finalized building footprint are needed to further delineate the depth to the natural bearing soil and groundwater. Additional subsurface explorations may also be required along the alignment of any permanent earth support walls for design purposes.”

In response to these review comments, please confirm that the recommendations and/or potential impacts are represented in the proposed scope of work and accurately accounted for in the cost estimates. The MSBA requires and strongly encourages that all assessments be completed during the early planning phases to fully understand these important site components are being incorporated into the project scope and budget at the time that MSBA calculates a potential grant as the impact to the District’s budget could be significantly impacted should the design team choose to defer performing this work in later phases of the project.

Additionally, please provide a timeline associated with performing any additional testing and confirm that the recommendations and/or potential impacts are represented in the proposed scope of work and accurately accounted for in the cost estimates. In addition, please keep the MSBA updated on any potential impacts to the project.

Also, please note that all cost increases subsequent to a Project Scope and Budget approval from the MSBA’s Board of Directors will be the sole responsibility of the District and considered ineligible for reimbursement. Please acknowledge.

8) The following information is provided:

- *Page 995 in the designer schedule indicates that the MBTA permit will be pursued in September 2027.*
- *Page 999 in the contractor schedule indicates that the MBTA permit will be pursued in February 2026.*
- *Page 246 states, “The project will need to file with the MBTA for a Zone of Influence license to do construction within the 30-foot zone. The anticipated turnaround time from the application processing date to the fully executed document date is approximately 4 to 6 months.*
- *Page 996 and 1000 both indicate that in July 2027 the early bid process for the geothermal contractor will be undertaken.*

In response to these review comments, please provide a clear critical path for submitting and receiving approval of the MBTA permit prior to construction on the geothermal field.

In addition, please confirm that all other applicable federal, state, regional, and local permitting and approval are identified and incorporated into the project schedule. Please note that all permitting requirements and approvals must be obtained prior to construction bidding. Please acknowledge.

12) *The proposed project appears to meet the minimum sustainability requirements described in the MSBA Green Schools Program. In addition, the submittal notes a goal of an additional 4% reimbursement, including 1% additional reimbursement in the three applicable IAQ LEED points, and 3% additional reimbursement by meeting the MA Specialized energy code as an all-electric building. The submitted LEED scorecard complies with the required additional IAQ points, and the MSBA notes that the Town of Needham requires compliance with the MA Specialized energy code. If the District does not meet the requirements of the Green Schools Program, the District will not qualify for some or all of these incentive points, and the MSBA will adjust the reimbursement rate accordingly. Please acknowledge in response to this review.*

14) *The District's PDP submittal provided information indicating that a Project Notification Form ("PNF") was submitted to the Massachusetts Historical Commission ("MHC") on July 11, 2025 and was subsequently approved by MHC on August 6, 2025. No further action is needed.*

15) *Based on the information provided, the room data sheets ("RDS") do not appear to align with the schematic design floor plans and the space summary. Subsequent to receiving the Schematic Design submittal, the MSBA received updated room data sheets, updated space summary, and floor plans on July 13, 2026. No further action is required.*

17) *The District's base reimbursement rate for calendar year 2026 is 36.89% which will be utilized when establishing the MSBA's potential grant.*

Please also note that the proposed total project budget continues to be reviewed, and the MSBA does not calculate a potential grant until the conclusion of the schematic design phase and the District and its project team should take caution in communicating this information as the project further develops.

18) *The information provided indicates potential add alternates in both the Designer's and OPM's cost estimates, and these have been captured in the MSBA's Alternates tab of the Total Project Budget spreadsheet. The MSBA understands that these potential alternates are not included in the total project budget and may only be exercised in a bid savings scenario. Please note that the MSBA calculates potential grants based on the scope of work established at schematic design and expects add and/or deduct alternates to be coordinated and established at schematic design. Please acknowledge.*

In the subsequent phases of design, the District must clearly describe any adjustments to the scope of work established at schematic design including the potential incorporation of add and/or deduct alternates and how these may impact the approved scope and budget established at schematic design. Any associated increase in cost established at schematic design as a result will be considered ineligible for reimbursement. Please acknowledge.

Additionally, in response to these review comments, please confirm that the documents provided in the schematic design account for all value engineering exercises that were made in the proposed project, and that the submitted budget aligns with the current design. Items evaluated and accepted in value engineering efforts should be provided with all future project submittals. Any associated increase in cost established at schematic design as a result will be considered ineligible for reimbursement. Please acknowledge.

22d) *In response to these review comments, provide an updated schedule that indicates the dates associated with the following:*

- *Sustainable Design Building milestones:*
 - *Project registration;*
 - *Provisional review submittal;*
 - *Final review submission;*
- *Release/ advertisement of filed sub-bids;*
- *Receipt of filed sub-bids; and,*
- *Receipt of general contractor bids or execution of the guaranteed maximum price (“GMP”).*

Furthermore, for Design Development (“DD”) and 60% and 90% Construction Document (“CD”) submissions, the schedule should include 21 calendar days for the MSBA to review each submission. Include 14 calendar days for the project team to respond to MSBA’s review comments and incorporate those responses into the project documents prior to the next submission or finalizing project documents to make available to bidders and note that the minimum duration between each MSBA design submission (DD, 60% CD, and 90% CD) is 35 calendar days.

23c) The District provided a certified copy of the meeting minutes from the June 16, 2026, School Building Committee meeting via email on July 14, 2026. No response required.

No further review comments for this section.

4.1.3 SCHEMATIC DESIGN PROJECT MANUAL

Provide the following Items		Complete; No response required	Provided; District’s response required	Not Provided; District’s response required	Receipt of District’s Response; To be filled out by MSBA Staff
1	Outline specifications in Uniformat Divisions	☐	☒	☐	☐
2	Itemization of all proprietary items (if any) with an explanation of each, explanation of the public interest for each item, and certification of local authorization that each item complies with state and local regulations, policies and guidelines.	☐	☒	☐	☐

MSBA Review Comments:

1) The MSBA notes that several sections of the specifications do not provide a minimum of three source items/products and/or basis of design. In subsequent phases of design, please ensure that a minimum of three named manufacturers is provided. Please acknowledge.

In response to these review comments, please confirm that District and building maintenance staff have been consulted on the BMS and lighting system, on manufactures for frequently replaced building features and on systems that may require frequent maintenance.

Also, please confirm that all systems controls are being coordinated with the Designer’s sub-consultants.

2) The information provided identifies several proprietary items. The District and Design team are reminded that for each proprietary item, the District will be required to provide an affidavit of which shall indicate that an elected body of the District (school committee, city or town council, or selectmen, but not ad-hoc building committee) has been presented with proposals for proprietary requirements approval action, has had an opportunity to investigate, or to require staff or consultant investigation upon each item so proposed, and has majority voted in an open public session that it is in the public interest to do so. Provide the MSBA with a certified copy of the vote of the elected body in subsequent submittals. For each item of material or equipment, the specifications shall provide for a minimum of three named brands of material or equipment and the words “or equal” or a description of material or equipment which can be met by a minimum of three manufacturers or producers. Proprietary products shall not be specified except as provided by M.G.L. c. 30, § 39M; however, when they are specified, proprietary specifications are subject to the “or equal” provisions of c. 30, § 39M. Please acknowledge.

No further review comments for this section.

4.1.4 SCHEMATIC DESIGN DRAWINGS

Provide the following Items		Complete; No response required	Provided; District's response required	Not Provided; District's response required	Receipt of District's Response; To be filled out by MSBA Staff
1	Existing site plan	☒	☐	☐	☐
2	Site development plan	☐	☒	☐	☐
3	Schematic building floor plans	☐	☒	☐	☐
4	Interior elevations of a typical general classroom, and typical Pre-K/K Classroom and typical Science Classroom/Lab as applicable.	☒	☐	☐	☐
5	Schematic exterior building elevations	☒	☐	☐	☐

MSBA Review Comments:

2) In response to these review comments, please review and respond to the following:

- Confirm all work is within zoning setbacks;
- Note that setbacks should be included in future submittals; and,
- Future areas of expansion are not specifically identified on the site development plans. Please clarify.
- Correct/coordinate incorrect references to other Towns within the Civil documents in subsequent phases of design.

Additionally, the information provided in the 'Draft Logistics Plan' on page 1028-1035 identifies a 25-foot buffer along the east edge of the site but does not depict the buffer along the northwest edge of the site adjacent to residential properties. This buffer is shown on the architectural plans and is labeled as a “transitional area”. In response to these review comments, please coordinate the floor plans between consultants to ensure the proposed buffer areas are shown consistently across the project documents.

3) *In response to these review comments, please provide the following:*

- *A narrative that describes the proposed roof access for the proposed project.*
- *Confirm that roof access provisions have been discussed with the District's maintenance, facilities, custodial personnel and local safety officials to ensure an appropriate level of access and safety has been incorporated in the proposed project. Clarify and confirm that walkway pads will be provided from all roof access points to all roof top mechanical units, skylights, and other parts of the roof that require access for maintenance and service.*

No further review comments for this section.

Additional Comments:

- *On February 25, 2026, the MSBA Board of Directors approved the District's Preferred Option 5E for a 257,872 square foot new construction option with an estimated total project cost of \$336,300,000. This Schematic Design submittal under review shows this same option currently as a 265,572 square foot new construction option with an estimated total project cost of \$325,405,945. This represents an increase of 7,700 square feet and a decrease of \$10,894,055. In response to these review comments, please provide a detailed description of the cost drivers associated with the decreased costs.*

Regarding Past Projects:

Both the MSBA's enabling legislation, M.G.L. c. 70B, and the MSBA's regulations, 963 CMR 2.00 et seq. specifically address the issue of past projects. MSBA records show a total MSBA payment of \$1,046,631 for the Pollard Middle School Green Repair Roof Replacement Project #201101990405G completed in October 2011. Pursuant to these requirements and depending on the School District's ultimate plan for the School, the MSBA may recover a pro-rated portion of the financial assistance that the School District has received for previous renovation grants. The exact amount recovered will be established at the conclusion of the Schematic Design / Total Project Budget phase. Please see the MSBA website to view the MSBA's regulations, statute, and closed school bulletin for additional information.

End