

MONTGOMERY EDUCATIONAL CONSULTANTS

EDUCATIONAL AND FACILITY PLANNERS

December 18, 2017

TO: Daniel G. Nerelli
Superintendent of Schools
Upper Darby School District

FROM: William Montgomery,
Educational Planner
Montgomery Educational Consultants

SUBJECT: **An Analysis of Middle School Building Utilization Scenarios for the Upper Darby School District**

Dear Mr. Nerelli,

Montgomery Educational Consultants (MEC) is pleased to provide a proposal for an analysis of the middle school building utilization for the Upper Darby School District (UDSD). Through review of multiple scenarios, a full understanding of the advantages and disadvantages of each option will be established. The results will allow all stakeholders to have a comprehensive understanding to make an informed decision.

MEC, as a partner, will work in collaboration with the Upper Darby School District administrators, staff, architectural firm, and other stakeholders to develop the criteria, variables, and scenarios that will provide the most comprehensive review of potential actions. We will bring all the experiences, understanding of educational processes, and the tools necessary to facilitate the needs the School District.

Being part of the project to produce enrollment projections and review of the potential elementary school actions has provided us with a clear understanding of the District's needs. Our working relationship with administration and understanding of the District and their data is a clear advantage that places us in the unique position of being able to fulfill the District's need in a professional and timely manner.

This document will outline the scope of work, identify the data required, and list the tasks MEC will perform to accomplish the required work. Additionally, this document provides a timeline for the deliverables. We understand it is a priority to complete the work in a timely manner. We will endeavor to provide a final product in mid-January.

SCOPE OF WORK

The goal of this project is to identify a series of scenarios, based on variables, and calculate the best building utilization for each scenario. In order to address this goal, the following work needs to be accomplished.

1. The gathering and configuration of necessary data.
 - Middle school building space inventory and usage.
 - Educational specifications for middle schools.
 - Middle school special education classes. Currently and future accommodations.
 - Current middle school feeder patterns.
 - Additional data as needed by project goals.
2. Identify scenarios to be evaluated. Scenarios will be based on established variables, with final list produced in conjunction with administration. Variables may include.
 - Potential changes to building spaces.
 - Enrollment at a point in time, current and projected.
 - Feeder school options, current and projected, school to school and split.
3. Each scenario will be evaluated for the optimal configuration. Additional scenarios may be added to provide comparisons and/or more options.
4. The results will be reviewed by a team and evaluated for their viability. The most viable scenarios will be identified and a more detailed discussion and analysis performed.
5. The most favorable scenarios that meet the District's goals will be presented.

The above items will be performed following the tasks outline in this report, using data associated with the District.

TIMELINE AND SCHEDULE

It is understood that this project will provide results necessary for important decision making and the District has requested an accelerated time frame. With this in mind, it is important to provide requested information and deliverables in a timely manner. The District's goal is for the work to be completed by mid-January 2018, assuming the project is started by mid December 2017.

COSTS

Montgomery Educational Consultants will provide the services listed in the Scope of Work for the price of \$14,300. This cost factors in an highly accelerated timeframe. The cost also includes all expenses incurred by MEC during the course of this contract and a maximum of 5 meetings. There will be no additional charges unless the School District requests work outside of the Scope of Work, in which case the work and estimated hours will be established with a \$175 hourly rate.

PROJECTS

Montgomery Educational Consultants has worked directly for the UDSD during 2017, so our professionalism and capabilities are known to the administration. However, if additional references are needed, please feel free to contact any of the following Districts that we have been proud to work with.

Norristown School District

- Address: 401 North Whitehall Rd, Norristown, PA 19403
- Phone: (610) 630-5006
- Contact: Ms. Anne Rohricht
- Time Frame: Spring 2015 to Present

- Work: Enrollment projections and demographic study, portfolio review, and developing a Long Range Facilities Plan

Richmond County School System

- Address: 864 Broad Street, Augusta, Georgia 30901
- Phone: (706) 826-1000
- Contact: Mr. Benton Stark
- Fall 2008 - Enrollment Projections and Demographic Changes
- Winter 2008 / Summer 2009 - Long Range Planning
- Winter 2011/Summer 2012 - Portfolio Review, School Closings
- Fall 2014/Winter 2015 - Location for construction of a new school, boundary changes
- Summer 2016 to Present - Portfolio Review - Establishing new school feeder boundaries

Rose Tree Media School District

- Address: 308 North Olive St, Media, PA
- Phone: (610) 627-6000
- Contact: Ms. Grace Eves
- Time Frame: Spring 2014 to Winter 2015
- Work: Enrollment projections and demographic study

Marple Newtown School District

- Address: 40 Media Line Road, Newtown Square, PA 19073
- Phone: (610) 359-4200
- Contact: Mr. Joe Driscoll
- Winter 2008 - Demographic and Enrollment Projections
- Spring 2010 - Enrollment Projections / Option Analysis
- Winter 2014 - Enrollment Projections due to new large developments

If you need any additional information please call me at 215-429-2910.

Sincerely,

William Montgomery, M.Ed
Educational Facilities Consultant