

III. Project Evaluation and Siting Criteria.

“The most effective capital programs prioritize all departmental requests in a ranking system that measures each project against set criteria and gives it a cumulative score. In this way, all proposals are subject to the same objective review standards and analyzed in the context of community-wide needs.”¹

The WRAP Committee has developed Capital Improvements Decision Criteria and a Site Selection Matrix by which to objectively measure the readiness of projects, and suitability of sites for specific projects. Two Worksheets present categories and questions by which to provide an objective basis for evaluation of proposed projects. A third Worksheet takes a specific project and evaluates its fitness for development at a particular site. It is hoped that a standard set of scoring criteria and evaluation factors will be used by a recommended future Capital Facilities Committee in objectively analyzing the need for projects, and suitability of sites for specific projects.

As part of the Worksheet development process, a number of documents from a diverse selection of municipalities and states were reviewed, including guidance from the Massachusetts Department of Revenue Division of Local Services 2016 document on “Presenting and Funding Major Capital Projects”; the Vermont League of Cities and Towns 2016 presentation on “Capital Improvement Programming”; and the International City and County Management Association 2012 analysis of “Capital Project Prioritization” for Edmonton, Alberta. A common thread throughout the literature reviewed is to establish an evaluation and ranking system for capital projects. Without such a system decision making becomes political rather than based on an objective ranking that may *“facilitate comparisons among diverse types of projects”*.²

The Forums and Charrette that were held by the WRAP Committee during September 2015 and January 2017 were instrumental in collecting input that assisted the WRAP Committee in refining the worksheets. Suggestions and comments were also provided by the Permanent Municipal Building Committee with regard to the Site Selection Worksheet.

One outcome of the Forums, Charrettes and other meetings, was that the WRAP Committee members realized many similarities in the development plans and programming of the Library Trustees, the Council on Aging, the Council on Aging/Community Center Advisory Committee and the Recreation Commission. The COA and Recreation Commission had joined forces in considering development of a community center that would accommodate programs for both organizations. In addition the COA/CC anticipated that it would also provide space for the Historical Commission to store and exhibit the many artifacts in its stewardship, space for the Veterans Affairs (office and meeting) and possibly for Boy and Girl Scouts. The COA/CC had considered the so called Municipal Pad at the new town center development. A compilation of the information from various community groups may be found in Exhibit III-A. This data aggregation and analysis led the WRAP Committee in the evolution of its development of the project criteria and site selection process.

¹ “Presenting and Funding Major Capital Projects – February 2016”, Division of Local Services, MA Department of Revenue

² “Capital Improvement Programming”, Sept 2016, Vermont League of Cities and Towns

As part of our development of the Worksheets, the WRAP Committee tested the concept through evaluation of the Library and COA/CC projects; these samples may be found in Exhibit III-B and III-C respectively.

The Library Trustees adapted an early version of the Site Selection Matrix (Exhibit III-D) developed by the WRAP Committee by which each site was scored using the same criteria. Their evaluation and scoring process led them to rank the former DPW site at 195 / 207 Main Street above the other sites at 5 Concord Rd (existing library) and at 202 Old Connecticut Path (municipal parcel at Greenways).

Project Evaluation Design Criteria: Prioritization

Worksheet 1 – (Exhibit III-E1) which was developed to assist with the objective evaluation and ranking of projects. The four criteria of Worksheet 1 that are measured when considering a specific project include:

- Public Health and Safety
- Compliance with Mandates or Other Legal Requirements
- Stated Community Goals and Policies
- Public Perception of Need

These criteria are listed in order of importance in determining need for projects. Each criteria may be scored from 0 to 5. The criteria are listed in order of importance and are weighed accordingly. The total aggregate score will have a maximum value of 50.

The first two criteria measure ways in which a project is responsive to public health and/or safety or compliance with legal requirements. These two criteria carry more weight than the criteria relating to community goals, policies, needs, and wishes. It is incumbent upon the project proponents to convey to the community whether a project is addressing a need versus a want. This increases in importance during periods where there may be projects competing for limited resources.

Public Health and Safety is considered the highest priority when determining the need for a proposed project. If this is a rationale for the proposed project the evaluation should address how the project would correct imminent and or continuing safety hazards, public health deficiencies, or other safety needs (of concern but not rising to an imminent hazard condition). Examples of such conditions include unsafe or unsanitary occupied spaces; older occupied spaces not meeting current building codes for fire sprinklers, etc.

Compliance with Mandates or Other Legal Requirements is often a driver for large projects. Such projects may be proposed in order to bring an existing facility into compliance with local, state or federal laws/regulations. Other projects may be related to a court order, judgement or inter-municipal agreement. Examples of this include the recent mechanical and safety upgrades to the

town-owned water well chemical feed buildings, or design and construction of the Wayland-Sudbury Septage Facility.

Stated Community Goals and Policies, as found in documents such as the town Master Plan, or the long range capital plans maintained by the Department of Public Works and Facilities Department, drive many proposed projects. These projects typically arise due to a desire for:

- Conformance with adopted program, policy or plan;
- Asset preservation (fiscal impact of new investment including a life-cycle plan with cost of operation & maintenance);
- Maintenance of an acceptable standard of service;
- Provision of a more efficient or improved standard of service

An example of such projects are the various municipal and school building replacement projects for windows, flooring and roofs.

Public Perception of Need may drive proposed projects based on a strong emotional argument from a specific group of proponents. These projects may arise to address a sustained change in demographics (school age children or the elderly); to improve sustainability of the environment; or to improve desirability of residing in the community.

There is substantial gray area between the last two criteria which will certainly lead to differences in opinion on how proposed projects are categorized and evaluated. Upcoming projects such as the proposed Library, Community Center, and Council on Aging will rely heavily on their proponents to explain to the community, and ultimately to Town Meeting voters, why their projects are “needs” and the projects’ importance to Wayland.

Project Evaluation Design Criteria: Characterization

Worksheet 2 – (Exhibit III-E2) which presents questions that assist in weighing the criteria and factors and in understanding the cost implications of a project;

The set of questions on Worksheet 2 helps to illuminate the need for and the impact of a project as well as potential synergies with other projects. These questions and factors help to measure each project and how it fits into long-range planning. The evaluation worksheet asks the proposer to address the following:

Describe any relationships, synergies, complementary uses, or impacts to other projects. Does the project address multiple needs / multiple stakeholders? This takes into account any synergies with other projects, such as whether services and space may be overlapping. It is critical to understand whether a proposed project addresses a single proponent’s need, or if it may be envisioned to address multiple needs. In the simplest of terms, space costs money – money that must be borrowed for design and construction, money to light, heat and cool the space, money for administrative and custodial services, and money for ongoing maintenance and replacement costs.

Meeting rooms, activity rooms, performance spaces, and similar spaces are candidates for shared use among different stakeholders. Sharing of such amenities will provide the town with effective use of its facilities while making the most efficient use of town funds.

Whether or not there are alternatives to a specific project is an important point. One alternative for the voters is a “no” vote on a specific project; having an alternative that may be explored during the process may lead to higher probability of a successful outcome.

The fiscal impact is realized by knowing what the capital costs will be and the year in which project funding is requested. The availability of potential grants is critical in determining when to schedule certain projects.

Additional information desired includes whether there is an annual operating and maintenance cost increase associated with the project such as a need for additional staffing, utilities or other costs. Finally, the projected fiscal impact of the capital expenditure per household helps residents understand the direct fiscal impact of the proposed project to their tax bills.

Site Selection Criteria

One Worksheet focuses on evaluating the proposed project at a specific location; this is Worksheet 3 – (Exhibit III-F) which lists the criteria and factors to evaluate the suitability of each site.

Site selection worksheets have been developed for a number of capital projects in recent years; including the siting worksheets for the Salt Shed (2004), Highway / Parks & Recreation Study (2006), and for the New DPW Facility (2011). Typically once sites with fatal flaws are eliminated (too small; within a wetland; etc.) the worksheets are used to rank the remaining potential sites based on numerical values assigned to relevant criteria. The site with the highest aggregate score would be considered to have the highest potential for development.

The WRAP committee selected what it believed to be the most useful criteria from prior efforts, developed new criteria, and assembled 10 broad categories for evaluation. The highest aggregate score possible is 100. The ten site selection criteria on Worksheet 3 by which to measure a development project include:

Location – with two subcategories: accessibility to roadways; and adjacency to what could be considered sensitive neighbors (schools, daycare, elderly uses, healthcare facilities). It should be noted that this adjacency could be considered a positive or a negative depending on the proposal project.

Physical Site Features – with six subcategories: the condition of an access roadway, the size of the site for the specific project, the shape of the parcel, the soil suitability, depth to groundwater, and potential for future expansion.

Site History – with three subcategories: past and existing uses that may be favorable or unfavorable to re-development, and the potential for impacts from the presence of hazardous materials.

Zoning Consistency– is the use allowed, disallowed, or a special permit required.

Environmental Impacts – with five subcategories: whether or not there is a designated Natural Heritage Endangered Species Program (NHESP) area, an Area of Critical Environmental Concerns (ACEC), a Zone II area, or Wetlands area, and whether or not there are any historical or archaeological sensitivities on or near the site.

Access to Utilities – with five subcategories: availability of sewer or septic, electricity, telecommunications, water, and natural gas service.

Permitting/Other Regulatory – whether or not there are specialty permits required.

Traffic Impacts – the estimate of the impact of the potential increased traffic.

Cost of Site Development – with three subcategories: whether cut and fill, clearing, and installation of site utilities will require minimal, normal or excessive costs.

Cost of Construction – whether or not there are restrictions relative to the site that will impact the cost of construction.

Recommendations

- That a standard set of scoring criteria and evaluation factors be used by a recommended future Capital Facilities Committee in objectively analyzing need for projects, and suitability of sites for specific projects.
- Implement Town-wide coordination of all departments' programs to merge overlaps and to consider in the overall planning for any proposed project.
- That the Town should address the needs for a master facilities scheduler; that is to assign a staff person the responsibility of coordinating and scheduling space needs for programs held by Library, COA, Recreation, and Schools to avoid overlaps and maximize use of space.
- To minimize the need for storage space, develop a Town-wide policy for culling records and other materials not required by a records retention policy.