



# Implementation Committee

## Meeting Agenda

### November 8, 2012

#### **In This Meeting Packet**

##### Item

- 2013 Meeting Schedule
- Applying the Project Information Worksheet to Additional SFP Project Types

**STATE ALLOCATION BOARD**

707 Third Street  
West Sacramento, California 95605  
www.opsc.dgs.ca.gov

**Implementation Committee  
Meeting Schedule****2013****Friday, January 11, 2013**

California State Capitol  
Sacramento, California

**Friday, July 12, 2013**

California State Capitol  
Sacramento, California

**Friday, February 8, 2013**

California State Capitol  
Sacramento, California

**Friday, August 9, 2013**

California State Capitol  
Sacramento, California

**Friday, March 8, 2013**

California State Capitol  
Sacramento, California

**Friday, September 13, 2013**

California State Capitol  
Sacramento, California

**Friday, April 12, 2013**

California State Capitol  
Sacramento, California

**Friday, October 11, 2013**

California State Capitol  
Sacramento, California

**Friday, May 10, 2013**

California State Capitol  
Sacramento, California

**Friday, November 8, 2013**

California State Capitol  
Sacramento, California

**Friday, June 14, 2013**

California State Capitol  
Sacramento, California

*Meetings are scheduled from 9:30 a.m. to 3:30 p.m. with a one-hour lunch break.*

*Please check [www.opsc.dgs.ca.gov](http://www.opsc.dgs.ca.gov) for hearing room assignments as meeting times, dates, and locations are subject to change.*

STATE ALLOCATION BOARD  
IMPLEMENTATION COMMITTEE MEETING  
November 8, 2012

Applying the Project Information Worksheet to  
Additional School Facility Program Project Types

PURPOSE OF REPORT

The purpose of the report is to present the Project Information Worksheet (PIW) for modernization projects.

DESCRIPTION

At the January 2012 State Allocation Board (Board) meeting, the Board directed Office of Public School Construction (OPSC) staff to take an item to the Implementation Committee (Committee) to explore ways to streamline the PIW, and to explore applying the PIW to additional School Facility Program (SFP) projects beyond new construction.

At the February, March and April 2012 Committee meetings, OPSC staff worked with the Committee to develop plans to streamline the PIW online submittal process through auto-population of any information already collected by the OPSC, and to develop options to reduce the number of submittals required. The Committee also discussed whether the PIW could be used for SFP project types other than new construction, such as modernization. Consensus was reached that the worksheet would need substantial modifications to capture meaningful modernization project data.

The Board provided further clarification that the original direction at the January 2012 Board meeting was to develop a detailed proposal to expand the PIW to collect data for other SFP project types, and that it expects that this proposal will be included in the item that the OPSC presents to the Board.

At the October 2012 Board meeting, the Board directed that the PIW be discussed at the State Allocation Board School Facility Program Review Subcommittee after the Committee discussion.

AUTHORITY

See Attachment A

BACKGROUND

The Board approved the PIW in September 2007 and modified it in May 2010. The PIW was approved by the Board for the following purposes:

- To analyze the relationship between the pupil grant and the cost of new construction pursuant to Education Code Section 17072.11(b)
- To demonstrate bond accountability
- To identify the changes in the bid climate over time
- To evaluate the High Performance Incentive (HPI) Grant

At the January 2012 Board meeting, the Board directed OPSC staff to bring a discussion of PIW improvements to the Committee, specifically to explore:

- Ways to streamline the PIW
- Reducing the number of required submittals for individual projects
- Applying the PIW to programs other than New Construction

At its February, March and April 2012 meetings, the Committee discussed the first two elements of the Board direction at length. Pursuant to these discussions, OPSC staff took steps to streamline the online entry of the PIW, and to create proposals for the Board to reduce the number of required submittals.

At this time, the PIW is required for these SFP project types:

- New Construction (50)
- Facility Hardship New Construction (51)
- Critically Overcrowded Schools (53)
- Charter Schools (54) (new construction only)
- Overcrowding Relief Grant (56)
- Modernization (57) – only High Performance Incentive information, if applicable

The PIW is not required for these SFP project types:

- Joint-Use (52)<sup>1</sup>
- Charter Schools (54) (rehabilitation )
- Career Technical Education (55) (new construction)
- Career Technical Education (59) (modernization)
- Modernization (57)
- Facility Hardship rehabilitation (58) (modernization)

In July 2012, the Committee began an in-depth discussion of how the PIW could be expanded to modernization programs. The Committee agreed that the current PIW would not effectively gather data for these programs, and that expanding the PIW to other programs would require different questions to address the wide variety of types of work that may be funded for modernization.

At the August and September Committee meetings, OPSC staff presented draft modernization PIW questions. The September draft PIW required districts to submit cost information per division of construction (concrete, masonry, metals, etc.) on a site-wide basis, building information (number of classrooms, type of construction, original

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<sup>1</sup> If a new construction project includes joint-use funding, then the district indicates the following information on the PIW: type of joint-use partner, OPSC application number (if applicable), type of joint-use facility and the amount of funds provided by the joint-use partner and/or the State. No information is gathered on the PIW for any joint-use project that is not part of a State-funded new construction project.

year the building was built, square footage of the building, etc.), and work information (roofing, HVAC, plumbing, etc.) on a building-by-building basis, in a flow chart format.

Members of the Committee stated that they believed there would be little value to the public in having cost information per division of construction and that many districts would not be able to accurately provide that level of cost data.

Regarding the building information section, members of the committee suggested that only site-wide information should be asked. Members also stated concerns regarding some of the specific building information questions and asked what the purpose of collecting some of the building information was.

And concerning the work information questions on a building-by-building basis, members of the committee stated that collecting detail of the work on a building-by-building basis would be very time consuming, but that detail of the work on a site-wide basis, and without cost information, could be provided and would require less time to complete.

At the October meeting, OPSC staff presented a sample draft modernization PIW that did not include any building specific information. Rather, the draft included the total square feet modernized per building type (permanent, modular or portable). The draft also included a table to enter the costs for each type of work included in the project on a site-wide basis and another table to enter the type and number of facilities modernized.

## STAFF ANALYSIS/STATEMENTS

Currently, a PIW is required for all new construction projects that receive funding based on new construction pupil grants, or for modernization projects that receive HPI grant funding. The PIW in its current form is used for all SFP project types that are funded through these grants. Because its questions are concerned with gathering new construction data, it could also be applied for Joint-Use and Career Technical Education (CTE) projects, though there may be additional data the Board would wish to capture for these programs.

The remaining SFP project types – Modernization, Facility Hardship Rehabilitation, CTE modernization and Charter School rehabilitation – are all variants of modernization. Just as the current PIW applies to several programs involving new construction, if the PIW was expanded to include questions related to modernization, it could be applied to all of these remaining programs.

The timelines for submitting the modernization PIW would be the same as the proposed timelines for submitting the current PIW: with the Form SAB 50-05 and the with final Form SAB 50-06 (pending Board approval to eliminate the currently required submittal with the first Form SAB 50-06), regardless of when the district submitted the Form SAB 50-04 and regardless of when the district received an apportionment for the project.

Attachment C details the information the PIW would collect. The “Project Information-Modernization” page would be in addition to the existing Project Information page, which applies to new construction only. (The existing page will be relabeled “Project Information-New Construction.”)

New modernization fields include:

- A box where districts will select the types of work the project involves (sitework, roofing, HVAC, plumbing, etc.), and how much is estimated to be or was spent on each type of work at the time the PIW is submitted . (The amounts in this box will not necessarily equal the total project cost amount that is determined earlier on the PIW because that figure includes, for example, soft costs and construction management fees.)
- A box where districts will identify the types and number of facilities that were modernized.
- A box where districts will list the total permanent, modular, and /or portable square footage modernized.
- A box to indicate the total cost per square foot modernized. This figure will be automatically calculated based on the information the district enters in the “Project Costs” section and the square footage modernized.

## NEXT STEPS

Continue the PIW for discussion at the State Allocation Board School Facility Program Review Subcommittee.

## ATTACHMENT A

### AUTHORITY

#### EDUCATION CODE

Education Code (EC) Section 17072.11 (b) states, "On or after January 1, 2008, the [Board] shall increase or decrease the per-unhoused-pupil grant eligibility determined pursuant to subdivision (a) by amounts it deems necessary to cause the grants to correspond to costs of new school construction, provided that the increase in any fiscal year pursuant to this section shall not exceed 6 percent."

EC 17074.25 states, "(a) A modernization apportionment may be used for an improvement to extend the useful life of, or to enhance the physical environment of, the school. The improvement may only include the cost of design, engineering, testing, inspection, plan checking, construction management, demolition, construction, the replacement of portable classrooms, necessary utility costs, utility connection and other fees, the purchase and installation of air-conditioning equipment and insulation materials and related costs, furniture and equipment, including telecommunication equipment to increase school security, fire safety improvements, playground safety improvements, the identification, assessment, or abatement of hazardous asbestos, seismic safety improvements, and the upgrading of electrical systems or the wiring or cabling of classrooms in order to accommodate educational technology. A modernization grant may not be used for costs associated with acquisition and development of real property or for routine maintenance and repair.

(b) A modernization apportionment may also be used for the cost of designs and materials that promote the efficient use of energy and water, the maximum use of natural lighting and indoor air quality, the use of recycled materials and materials that emit a minimum of toxic substances, the use of acoustics conducive to teaching and learning, and other characteristics of high-performance schools."

EC Section 17070.35(a) states, "In addition to all other powers and duties as are granted to the board by this chapter, other statutes, or the California Constitution, the board shall do all of the following: . . . (2) Establish and publish any procedures and policies in connections with the administration of this chapter as it deems necessary."

#### GOVERNMENT CODE

Government Code Section 15503 states, "Whenever the board is required to make allocations or apportionments under this part, it shall prescribe rules and regulations for the administration of, and not inconsistent with, the act making the appropriation of funds to be allocated or apportioned. The board shall require the procedure, forms, and the submission of any information it may deem necessary or appropriate. . . ."

## SCHOOL FACILITY PROGRAM REGULATIONS

School Facility Program (SFP) Regulation Section 1859.71 states, "The new construction per-unhoused-pupil grant amount, as provided by (EC) Section 17072.10(a), may be increased by an additional amount not to exceed six percent in a fiscal year, or decreased, based on the analysis of the current cost to build schools as reported on the Project Information Worksheet (New 09/07) which shall be submitted with the Forms SAB 50-05 and 50-06 and as approved by the Board."

SFP Regulation Section 1859.104.1 states, "A school district filing a (PIW) with the best information available will not be subject to a Material Inaccuracy for that information."

SFP Regulation Section 1859.71 states, "The new construction per-unhoused-pupil grant amount, as provided by Education Code Section 17072.10(a), may be increased by an additional amount not to exceed six percent in a fiscal year, or decreased, based on the analysis of the current cost to build schools as reported on the Project Information Worksheet (New 09/07) which shall be submitted with the Forms SAB 50-05 and 50-06 and as approved by the Board."

SFP Regulation Section 1859.104 states, "A School District receiving an Apportionment for high performance incentive grants pursuant to Section 1859.71.6 or 1859.77.4 shall submit a completed Project Information Worksheet to the OPSC for all expenditures related to the additional design and construction costs of the high performance building components. In addition, the School District shall provide information related to resulting energy savings and efficiency, as well as other resulting benefits. The Project Information Worksheet shall be submitted with the Form SAB 50-05 and the District's first and final Forms SAB 50-06 pursuant to (a)(1) and (2) above."

## ATTACHMENT B

### INSTRUCTIONS FOR PIW: Project Information-Modernization

- Choose from the drop down menu the type of school that best describes this project. (Elementary School, Middle School, Junior High School, High School, Continuation High School, Community School, Charter School, Special Education Severe, Special Education Non Severe, or Other).
- Enter the total number of teaching stations included in the entire school site.
- Enter the total number of students served on the entire school site, based on the most recent California Basic Education Data Systems (CBEDS) when the construction work occurred.

#### Type of Work Modernized

- Choose all types of work that are included in the project. For each type of work checked, enter the contracted and/or direct costs, excluding soft costs and contingency amounts. If the building was replaced, enter the cost of the new building. The total cost amount will not necessarily equal the Total Construction Cost entered on page 1 of this worksheet.

#### Facilities Modernized

- Select from the list the type and number of facilities modernized in this project. If the facility is considered multiple use, check the box that best represents how the facility will be used for the majority of the time. If the project consists of any facility types not listed, check "other" and explain.

#### Total Square Feet Modernized All Facilities

- Enter the total building square footage modernized for all facilities in the project. When calculating the square footage, include the total square footage identified on the DSA approved plans for all facilities modernized. Do not include area in which only incidental work was performed. (For example, do not enter the square footage of a facility if the only work completed in the building was the replacement of a sink). Be sure to use the same methodology when calculating square footage for each reporting period.
  - From the total square footage entered above, enter the amount of square footage that is considered permanent.
  - From the total square footage entered above, enter the amount of square footage that is considered permanent modular.
  - From the total square footage entered above, enter the amount of square footage that is considered portable pursuant to Education Code Section 17070.15(j).

#### Total Modernization Cost (Per Square Foot)

- When submitting online, the cost per square foot is automatically calculated based on the information provided in the Project Costs section and the Total Square Feet Modernized All Facilities. To verify this calculation, divide the total project cost, excluding site acquisition and site development costs (service site, off -site, utilities, parking structures, and general site) by the total square footage modernized as reported.

**INFORMATION**

The information collected using this form is necessary in order to conduct an analysis of the relationship between the per-unhoused-pupil grant eligibility and the per-pupil cost of new school construction for grades K-12 pursuant to Education Code Section 17072.11, to meet the requirements for bond accountability, and the status of the bid climate.

**INSTRUCTIONS**

This worksheet is to be completed and submitted with the *Fund Release Authorization* (Form SAB 50-05) for all new construction projects that are completing Part IV of the Form 50-05.

This worksheet is to be completed and submitted with the *Expenditure Report* (Form SAB 50-06) for all new construction projects that have received a fund release pursuant to Part IV of the *Fund Release Authorization*.

Attach to this form the accepted bid documents including additive/deductive alternates.

Completed By: Enter the name and title of the person completing this worksheet.

Phone Number: Enter the contact phone number for the person completing this worksheet.

Date Completed: Enter the date that the form was completed.

Application Number(s): Insert the application number provided by the Office of Public School Construction (OPSC).

Include the project number(s) of any other associated State funded projects. (e.g. joint-use)

School District: Insert the name of the school district where the project is located.

County: Insert the name of the county where the project is located.

Project Tracking Number: Insert the project tracking number provided by the OPSC, the California Department of Education (CDE), and the Division of the State Architect (DSA).

Project Name: Insert the name of the project (ex. – ABC Elementary School).

Indicate the time period that this form was filled out by checking the appropriate box. Enter the estimated percentage of the project completed. The percentage completed shall be the same as that which is reported on the *Expenditure Report*.

Project Funding

**Please provide actual amounts when available and estimates as necessary. Indicate whether the amount reported is the actual or an estimate by checking the appropriate box.**

1. Check yes or no to indicate if this is a financial hardship project.
2. Funds available (include site acquisition). If the project includes square footage from other State funded projects (e.g. joint-use), report the funds available from that project.
  - a. Enter the total actual amount of the State Apportionment(s) for this project (sum of 1 and 2).
    1. Enter the amount of the State Apportionment for this project
    2. Enter the amount of the State Apportionment for the joint-use project (if applicable).
  - b. Enter the estimated or actual amount of interest earned on State funds for this project.
  - c. Enter the total actual amount of the District Match for this project (sum of 1 and 2).
    1. Enter the amount of the District Match for this project.
    2. Enter the amount of the District Match for any joint-use project (if applicable).
  - d. Enter the estimated or actual amount of any additional local (district) funds that were necessary to complete this State funded project.

Project Costs

**Please provide actual contract amounts when available and estimates as necessary. Indicate whether the amount reported is the actual contract amount or an estimate by checking the appropriate box.**

1. Site Acquisition Costs  
Enter the total cost for site acquisition, including State share, district share, and any additional local funds. Include any costs for environmental studies and fees.

2. Bid/Construction Contract(s) Data. If the bid(s) includes square footage for other State funded projects (e.g. joint-use), include all associated costs.
  - a. Enter the accepted base bid amount prior to any accepted additive/deductive alternates for all contracts. If there is more than one contract signed (e.g. multiple-prime, etc.) please enter the total of all base bids.
  - b. Enter the amount of all accepted additive/deductive alternates for all contracts.
  - c. Enter the amount of the total construction contract(s). Include the amount of any change orders or addendums, if applicable.
    1. Enter the amount of the building cost in the contract(s).
    2. Enter the estimated amount of the site development work, including service site, offsite, utilities, and general site, included in the contract(s).
    3. Enter the amount of any other construction costs included in the contract(s) (e.g. demolition, interim housing, Labor Compliance Program, General Condition fees, as applicable). If using construction management, enter any general condition fees in 5 below. *Do not include any costs listed in 5 below.*
3. Enter the amount of actual and estimated (not yet contracted, invoiced or obligated) soft costs for the project (e.g. tests and inspections, architect fees, etc.) *Do not include any costs reported in 4 below.*
4. Enter the amount of the estimated remaining hard costs not yet contracted, invoiced or obligated (e.g. portions of work not yet bid, etc.) that are necessary for the completion of this project. *Do not include any costs reported in 3 above.*
5. Enter the amount of Construction Management Fees. If the project is being bid as multiple-prime, include costs for general conditions, etc. *Do not include any costs listed in 2(c)(3) above.*
6. Enter the actual or estimated amount for project contingencies.
7. Enter the actual or estimated amount for furniture and equipment.
8. Enter the amount of the Total Project Cost (do not include site acquisition costs). This amount should be equal to the sum of 2c, 3, 4, 5, 6 and 7 above.

#### Joint-Use Information

1. Check yes or no to indicate whether the project includes a joint-use partner, even if the joint-use project does not include State funding. Enter the OPSC application number if applicable.
2. Check the appropriate box to indicate which type of joint-use partner is included in the joint-use project.
3. Check yes or no to indicate whether the joint-use partner is contributing capital funding towards this project. If applicable, enter the dollar amount the joint-use partner is contributing.
4. Check which facility(ies) are part of the joint-use project. If other is chosen, please explain the type of joint-use project.

#### Project Information

- Choose from the drop down menu the type of project that is being built (e.g. new school, addition, etc.)
- Choose from the drop down menu the type of school that best describes this project (e.g. elementary, middle, etc.)
- Select what outdoor facilities you have and how many of each are in the project. If the facility is considered multiple use, check the box that best represents what the facility will be used for the majority of the time. If the project consists of any other playfields not listed, check "other" and explain.
- Check the boxes of the grade levels in the project. Based upon the District's loading standard, enter the number of pupils that can be served at each grade level.
- Enter the master plan site capacity of the project based on single-track use and local district loading standards. Based on teacher contracts and/or local loading standards this number **may be** different from the number of pupils requested on the *Application for Funding*.
- Enter the square footage of the parking structure (if applicable).
- Enter the total net useable site acreage of the project.

#### Component Types

- Choose all components that are included in the project. Include the number of each type of facility. Indicate the number of each type of classroom building(s) (e.g. 8 permanent, 4 portable). Indicate if there are any stand-alone restroom buildings. If indicating "other" facilities, a detailed listing of those facilities is not required unless the facility being constructed is atypical or a non-standard facility. If so, then please explain.
- From the pull down menu, choose the main type of construction for each of the buildings in the project (e.g. permanent, modular, portable).
- Enter the square footage of each component that was in the DSA approved plans at the time the project was apportioned by the State Allocation Board (SAB). If more than one component is contained in the same building, in order to prevent duplication, report the square footage by each component. (e.g. library in administrative building, report the square footage under the library and administration under administration). If a building is a classroom building report the square footage of the entire building (e.g. hallways, mechanical area, teacher workrooms, etc.).

**PROJECT INFORMATION WORKSHEET**

(Rev 5/2010/10/2012)

- At the time of fund release, only complete this section if there has been a change in scope in the DSA approved plans since the time the project was apportioned by the SAB. Enter the square footage of each component that is in the plans (including any adjustments for addendums or changes orders) when the district submitted its *Fund Release Authorization*. Indicate the square footage of any stand-alone restroom buildings.
- Enter the square footage for each component in the plans (including any adjustments for addendums or changes orders) at the time of the first annual expenditure report and at the time of the final expenditure report.

*Total Square Feet All Facilities*

- Enter the total building square footage for all facilities in the project. When calculating the square footage, include the total square footage identified on the DSA approved plans for all facilities. Be sure to use the same methodology when calculating square footage for each reporting period.
  - ⇒ From the total square footage entered above, enter the amount of square footage that is considered stick- built.
  - ⇒ From the total square footage entered above, enter the amount of square footage that is considered permanent modular.
  - ⇒ From the total square footage entered above, enter the amount of square footage that is considered portable pursuant to Education Code Section 17070.15(j).

*Total Building Cost (Per Square Foot)*

- When completing the Worksheet for the first time, enter the original estimated building cost per square foot. For subsequent reports, enter the current estimated or actual cost per square foot. To determine the cost per square foot, divide the total building cost, excluding site acquisition and site development costs (service site, off-site, utilities, parking structures, and general site) by the total building square footage as reported.

Additional Information: This information is being collected to evaluate the bid climate.

1. Enter the number of bidders on this project. If more than one contract was signed for this project (e.g. Multiple-Prime), enter the average number of bidders per trade.
2. Enter the date(s) the bid(s) opened. If more than one bid date, enter the opening bid date of the first bid package.
3. Enter the number of times the project was re-bid, if applicable.
4. Describe the accepted additive/deductive alternates that were included in the project costs. Indicate whether they included facilities or building elements. If the additive/deductive alternate included buildings, please indicate the square footage.
5. Check yes or no to indicate if the contract(s) includes any facilities or other construction that have not yet been identified elsewhere on this form. If yes, explain what those facilities or construction include.
6. Check yes or no to indicate whether the SAB approved project was modified due to cost.
  - a. If yes explain briefly what measures were taken (e.g. from permanent classrooms to portable etc.)
7. Indicate what facilities, components, or elements, if any, that were included in the SAB approved project have been eliminated. Indicate if any facilities, components, or elements, were added to the project. Provide a brief explanation as to why they were altered.
  - a. If the project received an Adjusted Grant fund release on or after November 1, 2007, check yes or no to indicate whether any facilities and/or square footage that was added or deleted was approved by the CDE, and/or the DSA, and/or the SAB. Please attach the appropriate documentation.
  - b. Check yes or no to indicate if the facilities are intended to be deferred to a later phase. If yes, please explain. Please note: If you have, or are considering a deviation to the scope of work outlined in the SAB approved project plans, please consult with the CDE, the DSA and the SAB.
8. Check yes or no to indicate whether there were any local requirements or ordinances the district had to meet that were not covered within the State program(s) provisions (e.g. road or street improvements, utilities, or fees demanded by another local agency, etc.)
  - a. Check yes or no to indicate whether or not these costs were included in the construction contract.
  - b. If yes, describe the local requirement and the associated costs.
9. Check yes or no to indicate whether or not you utilized existing architectural plans from another project.
  - a. If yes, indicate how many times the plans have been re-used within the district. Indicate the name(s) of the project(s).
  - b. Indicate the name any other school districts that have used these plans, if known. Indicate the name of the architect who designed the plans.

Comments/Additional Information

Please provide any additional information about this project that you think will be helpful in completing the analysis.

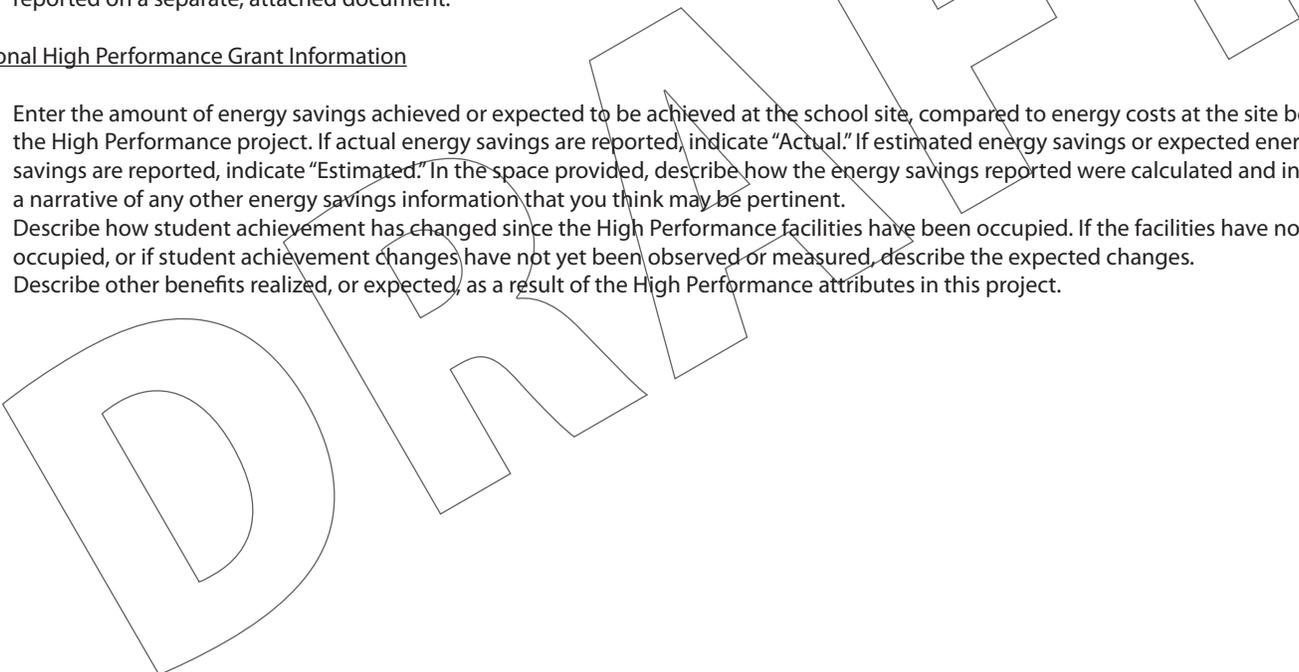
High Performance Incentive Grant Information

The "High Performance Incentive Grant Information" and "Additional High Performance Incentive Grant Information" sections must be completed, at every reporting period, only for projects that were apportioned funds for a High Performance Incentive (HPI) grant pursuant to SFP Regulation section 1859.71.6 and 1859.77.4. The information reported in these sections will not be used for the purposes of recovering funds or auditing projects.

1. Check yes or no to indicate whether this is a financial hardship project.
2. Enter the number of High Performance Incentive points verified for this project.
3. Enter the total actual amount (or estimated amount if actual is not available) of the State Apportionment(s) for this project.
  - a. Enter the total actual amount (or estimated amount if actual is not available) of the State share of the High Performance Incentive grant amount.
4. Enter the total actual amount (or estimated amount if actual is not available) of the District Match for this project.
  - a. Enter the total actual amount (or estimated amount if actual is not available) of the District Match of the High Performance Incentive grant amount.
5. List all *hard costs* for systems, components, or elements in the project that contributed to meeting High Performance Rating Criteria. For each system, component, or element, indicate the cost (actual, or estimated if actual is not available). Also indicate the cost of a comparable non-High Performance standard system, component, or element, and the difference between the High Performing cost and the standard cost. If more space is needed, the information requested in this section may be reported on a separate, attached document.
6. List all *soft costs* for elements (such as commissioning, planning, design, consulting, etc.) in the project that contributed to meeting High Performance Rating Criteria. For each element, indicate the cost (actual, or estimated if actual is not available). Also indicate the cost of a comparable non-High Performance standard element that would have been included in a non-High Performance project, and the difference between the High Performing cost and the standard cost. If more space is needed, the information requested in this section may be reported on a separate, attached document.

Additional High Performance Grant Information

1. Enter the amount of energy savings achieved or expected to be achieved at the school site, compared to energy costs at the site before the High Performance project. If actual energy savings are reported, indicate "Actual." If estimated energy savings or expected energy savings are reported, indicate "Estimated." In the space provided, describe how the energy savings reported were calculated and include a narrative of any other energy savings information that you think may be pertinent.
2. Describe how student achievement has changed since the High Performance facilities have been occupied. If the facilities have not been occupied, or if student achievement changes have not yet been observed or measured, describe the expected changes.
3. Describe other benefits realized, or expected, as a result of the High Performance attributes in this project.



**PROJECT INFORMATION WORKSHEET**

(Rev 5/2010/10/2012)

**STATE ALLOCATION BOARD - OFFICE OF PUBLIC SCHOOL CONSTRUCTION**

The information collected using this form is necessary in order to conduct an analysis of the relationship between the per-unhoused-pupil grant eligibility and the per-pupil cost of new school construction for grades K-12 pursuant to Education Code Section 17072.11, to meet the requirements for bond accountability, and status of the bid climate.

COMPLETED BY		TITLE	
PHONE NUMBER		DATE COMPLETED	
APPLICATION NUMBER(S)			
SCHOOL DISTRICT		COUNTY	
PROJECT TRACKING NUMBER		PROJECT NAME	
REPORTING PERIOD			
<input type="checkbox"/> FUND RELEASE (FORM SAB 50-05)		<input type="checkbox"/> ANNUAL REPORTING PERIOD (FORM SAB 50-06)	
		PERCENT COMPLETED _____	

**PROJECT FUNDING**

1. Is this a Financial Hardship Project?  Yes  No

2. Funds Available:

- a. Total Amount of State Apportionment(s):.....
  - 1. Project:.....
  - 2. Joint-Use (if applicable):.....
- b. Interest Earned on State Apportionment for this project:.....
- c. Total District Match:.....
  - 1. Project:.....
  - 2. Joint-Use (if applicable):.....
- d. Additional Local Funds Necessary to Complete State Funded Project:.....

AMOUNT	ESTIMATE	ACTUAL
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>

**PROJECT COSTS**

- 1. Total cost for site acquisition (State share & District amount):.....
- 2. Bid/Construction Contract Data:
  - a. Accepted Base Bid Amount Prior to additive/deductive alternates:.....
  - b. Amount of accepted additive/deductive alternates:.....
  - c. Total Construction Cost:.....
    - 1) Building Cost in Contract(s):.....
    - 2) Site Development in Contract(s):.....
    - 3) Other (Interim Housing, Demolition, General Conditions, if Applicable):.....
- 3. Soft Costs (e.g., tests and inspections, architect fees, etc.):.....
- 4. Estimated Remaining Project Cost Not Yet Contracted (Hard Costs):.....
- 5. Construction Management Fees (General Conditions, if applicable):.....
- 6. Contingency:.....
- 7. Furniture and Equipment:.....
- 8. Total Project Cost (Sum of 2c, 3, 4, 5, 6 and 7):.....

AMOUNT	ESTIMATE	ACTUAL
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>

**JOINT-USE INFORMATION**

1. Did the project include a Joint-Use partner?  Yes  No      OPSC Application Number (if applicable): \_\_\_\_\_

2. Which type of Joint-Use partner did it include?  Non-Profit     Government     Higher Education     Other (Explain)

3. Did the Joint-Use partner contribute any capital funding towards the construction of the project?  Yes  No  
If yes, how much? \$ \_\_\_\_\_

4. Which facilities were involved ?  Gymnasium     Multi-Purpose Room     Teacher Education Facility  
 Library     Childcare Facility     Other (Explain)

**PROJECT INFORMATION WORKSHEET**

(Rev 5/2010 10/2012)

**PROJECT INFORMATION - NEW CONSTRUCTION**

Project Type

School Type

<b>Master Plan Site Capacity of Project</b> <i>(Based on single-track use and local district loading standard):</i>	
<b>Square Footage of Parking Structure</b> <i>(if applicable):</i>	
<b>Net Useable Site Size (Acres):</b>	

Outdoor Physical Education Facilities <i>(Check all that apply)</i>	
FACILITY	NUMBER
<input type="checkbox"/> Baseball Diamond	
<input type="checkbox"/> Softball Diamond	
<input type="checkbox"/> Football/Soccer Field	
<input type="checkbox"/> Playground/Hardcourt/Turf	
<input type="checkbox"/> Track	
<input type="checkbox"/> Swimming Pool	
<input type="checkbox"/> Stadium	
<input type="checkbox"/> Other <i>(Explain)</i>	

Grade and Number of Pupils Served <i>(Check all that apply)</i>	
GRADE	PUPILS SERVED
<input type="checkbox"/> K	
<input type="checkbox"/> 1	
<input type="checkbox"/> 2	
<input type="checkbox"/> 3	
<input type="checkbox"/> 4	
<input type="checkbox"/> 5	
<input type="checkbox"/> 6	
<input type="checkbox"/> 7	
<input type="checkbox"/> 8	
<input type="checkbox"/> 9	
<input type="checkbox"/> 10	
<input type="checkbox"/> 11	
<input type="checkbox"/> 12	
<input type="checkbox"/> Non-Severe	
<input type="checkbox"/> Severe	

COMPONENT TYPES:		CONSTRUCTION TYPE (CHOOSE FROM PULL DOWN MENU)	SQUARE FOOTAGE FROM DSA APPROVED PLAN	FUND RELEASE (FIRST REPORT) SQUARE FOOTAGE	FIRST ANNUAL REPORT	FINAL
<i>(Complete if applicable)</i>	NUMBER				SQUARE FOOT	EXPENDITURE REPORT
					SQUARE FOOT	SQUARE FOOT
<input type="checkbox"/> Classrooms						
<input type="checkbox"/> Classrooms						
<input type="checkbox"/> Classrooms						
<input type="checkbox"/> Multi-Purpose Room/Cafeteria						
<input type="checkbox"/> Cafeteria - Stand Alone						
<input type="checkbox"/> Kitchen						
<input type="checkbox"/> Library						
<input type="checkbox"/> Gym/Shower Locker Room						
<input type="checkbox"/> Administration/Support						
<input type="checkbox"/> Performing Arts Facility						
<input type="checkbox"/> Restroom Building						
<input type="checkbox"/> Other <i>(Explain)</i>						
<b>Total:</b>						

Total Square Feet All Facilities	
Permanent:	
Modular:	
Portable:	

Total Building Cost (Per Square Foot)	
ORIGINAL ESTIMATE	CURRENT ESTIMATE/ACTUAL
\$	\$

**PROJECT INFORMATION WORKSHEET**

(Rev ~~5/2010~~ 10/2012)

**PROJECT INFORMATION - MODERNIZATION**

School Type

Total Teaching Stations on Site

Total Pupils Served on Site

TYPE OF WORK	COMPONENT HARD COST AMOUNT	
	FIRST SUBMITTAL	SECOND SUBMITTAL
<input type="checkbox"/> Building Replacement	\$	\$
<input type="checkbox"/> Hazardous Materials Abatement	\$	\$
<input type="checkbox"/> Sitework	\$	\$
<input type="checkbox"/> Structural/Seismic Upgrades	\$	\$
<input type="checkbox"/> Roofing	\$	\$
<input type="checkbox"/> Site Infrastructure	\$	\$
<input type="checkbox"/> Building Interior (Wall Systems, Flooring, Casework)	\$	\$
<input type="checkbox"/> Building Exterior (Wall Systems, Windows, Doors)	\$	\$
<input type="checkbox"/> HVAC	\$	\$
<input type="checkbox"/> Plumbing	\$	\$
<input type="checkbox"/> Technology Upgrades	\$	\$
<input type="checkbox"/> Renewable Energy Systems	\$	\$
<input type="checkbox"/> Electrical	\$	\$
<input type="checkbox"/> Access Compliance/ADA	\$	\$
<input type="checkbox"/> Other (please specify)	\$	\$
<b>Total:</b>	\$	\$

Facilities Modernized <i>(Check all that apply)</i>	
FACILITY	NUMBER
<input type="checkbox"/> Classrooms	
<input type="checkbox"/> Administration/Support	
<input type="checkbox"/> Gym/Shower Locker Room	
<input type="checkbox"/> Multi-Purpose Room/Cafeteria	
<input type="checkbox"/> Cafeteria - Stand Alone	
<input type="checkbox"/> Kitchen	
<input type="checkbox"/> Library	
<input type="checkbox"/> Performing Arts Facility	
<input type="checkbox"/> Restroom Building	
<input type="checkbox"/> Play/Athletic Field	
<input type="checkbox"/> Playground/Hardcourt/Turf	
<input type="checkbox"/> Track	
<input type="checkbox"/> Swimming Pool	
<input type="checkbox"/> Stadium	
<input type="checkbox"/> Parking Drop-off	
<input type="checkbox"/> Parking Structure	
<input type="checkbox"/> Other (Explain)	

Total Square Feet Modernized All Facilities
Permanent:
Modular:
Portable:
Total:

Total Modernization Cost (Per Square Foot)	
ORIGINAL ESTIMATE	CURRENT ESTIMATE/ACTUAL
\$	\$

**PROJECT INFORMATION WORKSHEET**

(Rev 5/2010 10/2012)

**ADDITIONAL INFORMATION: This information is being collected to evaluate the bid climate.**

1. How many bidders bid the project? \_\_\_\_\_

2. What date did the bid(s) open? \_\_\_\_\_

3. How many times was the project re-bid? \_\_\_\_\_

4. Please describe the accepted additive/deductive alternates:

Facilities (e.g., Multi-Purpose, Gym, Library) Sq. Ft. \_\_\_\_\_

Building Elements (e.g., metal roof, glazing)

5. Did this contract(s) include any facilities or other construction that has not yet been identified on this form?

Yes  No Explain. \_\_\_\_\_

6. Was the project modified due to cost?  Yes  No

a. What measures were taken? (e.g., permanent to portable) Explain \_\_\_\_\_

7. Indicate which facilities or elements were eliminated to meet the project budget and/or indicate any facilities that were added to the project.

Provide a brief explanation of why they were eliminated. \_\_\_\_\_

a. Answer the following question only if the project received an Adjusted Grant fund release on or after November 1, 2007. Were the facilities and/or square footage that was added or deleted approved by:

the CDE  Yes  No

the DSA  Yes  No

the SAB  Yes  No

Please attach the appropriate documentation.

b. Are these buildings considered deferred until a later date?  Yes  No

If yes, explain. \_\_\_\_\_

8. Were there any local requirements or ordinances the district had to meet that were not funded with State funds (e.g., road, street improvements, utilities, fees)?  Yes  No

a. If yes, were these costs included in the contract?  Yes  No

b. If yes, please specify the local requirement and the associated cost. \_\_\_\_\_

Cost: \$ \_\_\_\_\_

9. Did you utilize existing architectural plans from another project?  Yes  No

a. If yes, how many times were these plans re-used within the district? \_\_\_\_\_ Project Name(s): \_\_\_\_\_

b. Indicate which other districts have used these plans, if known. \_\_\_\_\_

Who was the architect? \_\_\_\_\_

Comments/Additional Information \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**HIGH PERFORMANCE INCENTIVE GRANT INFORMATION**

1. Is this a financial Hardship Project?  Yes  No
2. Number of HPRC Points attained: \_\_\_\_\_
3. Total State Apportionment:.....
- a. State Share HPI:.....
4. Total District Match:.....
- a. Total HPI Match:.....
5. Differential Hard Costs of Achieving High Performance:

AMOUNT	ESTIMATE	ACTUAL
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>

Component/Element	High Performing Cost	Standard Cost	Difference
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

6. Differential Soft Costs of Achieving High Performance:

Component/Element	High Performing Cost	Standard Cost	Difference
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

**ADDITIONAL HIGH PERFORMANCE INCENTIVE GRANT INFORMATION**

1. Energy Savings:.....
- Description of Energy Savings

AMOUNT	ESTIMATE	ACTUAL
\$	<input type="checkbox"/>	<input type="checkbox"/>

2. Student Achievement

3. Other Benefits Realized