

STATE ALLOCATION BOARD
IMPLEMENTATION COMMITTEE MEETING
February 10, 2012

SB 128: High Performance Incentive grants for Career Technical Education Facilities Program projects

PURPOSE OF REPORT

To present options in order to implement Chapter 622, Statutes of 2011 (Senate Bill (SB) 128 – Lowenthal).

BACKGROUND

SB 128 amended Education Code to allow schools districts with School Facility Program (SFP) Career Technical Education Facilities Program (CTEFP) projects to request High Performance Incentive (HPI) grant funds, including HPI grant funds above the CTEFP per-project maximum grant allowances.

Career Technical Education Facilities Program

Chapter 35, Statutes of 2006 (Assembly Bill (AB) 127 – Nunez) and 2006's Proposition 1D allocated \$500 million for the CTEFP. As of January 25, 2012, \$1.4 million in bond authority remained in the CTEFP account.

Pursuant to statute:

- The CTEFP grant is based on project costs.
- Some CTEFP projects consist solely of equipment.
- Not including CTEFP projects receiving HPI grants, CTEFP new construction grants cannot exceed \$3 million per project per schoolsite and CTEFP modernization grants cannot exceed \$1.5 million per project per schoolsite.
- The local match for both CTEFP new construction and CTEFP modernization projects is 50 percent.

At the May 25, 2011 State Allocation Board (Board) meeting, the Board decided to continue providing unfunded approvals to CTEFP applicants in the third funding cycle using all available bond authority and to keep the third funding cycle open. 73 CTEFP applications totaling approximately \$101.3 million in State funds have been received by the Office of Public School Construction (OPSC), but have not been approved by the Board.

The average CTEFP new construction project has received \$1,626,661 in State funding (including State loans).

The average CTEFP modernization project has received \$575,289 in State funding (including State loans).

High Performance Incentive Grant

Chapter 35, Statutes of 2006 (AB 127 – Nunez) and 2006's Proposition 1D allocated \$100 million for the HPI grant. As of January 25, 2012, \$60.3 million in bond authority remained in the HPI grant account.

Qualifying SFP projects receive:

- a percentage increase to their per-pupil grant amount relative to the HPI "points" the Division of the State Architect (DSA) awards the project and
- a High Performance Base Incentive Grant:
 - \$150,000 for New Construction projects on new sites
 - \$250,000 for New Construction projects on existing sites and Modernization projects

Projects receive HPI points if the project design and materials include attributes 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 or high performance schools.

For projects accepted by the DSA using the 2009 Edition of the California-Collaborative for High Performance Schools Criteria, SFP projects require a minimum of 27 HPI points for New Construction (new site) projects or 20 HPI points for New Construction (existing site) and Modernization in order to receive HPI grants.

OPSC staff intends to present data detailing average HPI grant amounts received by qualifying SFP projects at the Implementation Committee meeting.

OPTIONS

Because the CTEFP grant is based on project costs and the HPI grant combines a percentage increase to the per-pupil grant and a base incentive grant, the SFP regulations that specify the HPI grant calculations cannot be directly applied to the CTEFP. Therefore, regulatory updates are necessary to apply the HPI grant to the CTEFP.

The options presented below were developed by staff in order to begin the implementation discussion and are not intended to be an exhaustive summary of all options. Staff welcomes public comment and is open to discussing options not included below.

Option 1) Apply the existing HPI funding model to the CTEFP. Include the High Performance Base Incentive Grant and apply the percentage increases to the cost estimate instead of the per-pupil grant amounts.

Pursuant to statute, CTEFP projects are funded based on costs, not per-pupil grant amounts. Therefore, percentage increases could be applied to cost estimates.

Option 2) Apply only the existing High Performance Base Incentive Grant. Eliminate the percentage increase.

Because the percentage increase as it exists applies to per-pupil grant amounts, which is not how CTEFP funding is calculated, eliminate the percentage increase and only apply the High Performance Base Incentive Grant. Projects would be eligible for the High Performance Base Incentive Grant if they meet the current HPI grant thresholds: 27 HPI points for New Construction (new site) projects or 20 HPI points for New Construction (existing site) and Modernization.

Pro: Districts would easily know exactly how much HPI funding they would receive.

Con: The High Performance Base Incentive Grant is not based on project-specific costs like the CTEFP.

Option 3) Apply only the percentage increase to the cost estimate. Eliminate the High Performance Base Incentive Grant.

Pro: The HPI point system would be based, in part, on cost.

Con: The HPI percentage system is more complicated than the base grant. Districts may not easily know what their HPI grant would be until SAB approval.

All options presented:

Pro: These options are based on existing regulations. Therefore, regulatory amendments to implement these options could be minimal.

Con: For CTEFP projects with costs below the \$3 million new construction/\$1.5 million modernization cap, there may be high-performance systems that are eligible costs under the CTEFP *and* receive funding from the HPI grant account.

Eligible Applications

Pursuant to SFP Regulation Section 18959.107, “a funding application...submitted to the OPSC that has not received an approval will receive funding under the provisions of the regulations that were in effect when the application was submitted to the OPSC.... At the option of the district, a funding application submitted to the OPSC that has not received an approval may be withdrawn and resubmitted for SAB approval under the provisions of any amended or new regulation once it is effective. The district must request that the application be withdrawn and removed from the OPSC workload list. The resubmitted application will receive a new processing date by the OPSC.”

Therefore, the 73 CTEFP applications that have been received by the OPSC, but that have not been approved by the Board, are not eligible for any new regulation that applies the HPI grant to the CTEFP unless the districts withdraw and resubmit the applications.

The resubmitted applications would only be accepted by the OPSC if the Board establishes an additional CTEFP filing round.

AUTHORITY

SB 128 adds paragraph (l) to Education Code (EC) Section 17078.72:

17078.72

(a) The Career Technical Education Facilities Program is hereby established to provide funding to qualifying local educational agencies-for the purpose of constructing new facilities or reconfiguring existing facilities, including, but not limited to, purchasing equipment with an average useful life expectancy of at least 10 years, to enhance educational opportunities for pupils in existing high schools in order to provide them with the skills and knowledge necessary for the high-demand technical careers of today and tomorrow.

...

(d) Grants shall be allocated on a per-square-foot basis for the applicable type of construction proposed or deemed necessary by the board consistent with the approved application for the project.

(e) New construction grants shall not exceed three million dollars (\$3,000,000) per project per schoolsite, inclusive of equipment, and shall only be allocated to comprehensive high schools that have an active Career Technical Advisory Committee pursuant to Section 8070, in either of the following methods:

(1) For a stand-alone project on a per-square-foot basis for the applicable type of construction proposed, based on the criteria established pursuant to subdivision (b), consistent with the approved application for the project.

(2) For new school projects, as a supplement to the per pupil allocation pursuant to Section 17072.10. The supplement is intended to cover excess costs uniquely related to the facilities required to provide the career technical education program or programs.

(f) Modernization grants shall not exceed one million five hundred thousand dollars (\$1,500,000) per project per schoolsite, inclusive of equipment and may be awarded to comprehensive high schools or joint power authorities currently operating career technical education programs that have an active Career Technical Advisory Committee pursuant to Section 8070 for the purpose of reconfiguration. For comprehensive high schools, the grant shall be supplemental to the per pupil allocation pursuant to Section 17074.10. The supplement is intended to cover excess costs uniquely related to the facilities required to provide the career technical education program or programs.

(g) (1) A school district shall contribute from local resources a dollar amount that is equal to the amount of the grant of state funds awarded under subdivisions (d), (e), and (f). The required local contribution may be provided by private industry groups, the school district, or a joint powers authority....

...

(l) Notwithstanding paragraphs (e) and (f), a project approved pursuant to this section is also eligible for an incentive grant from the funds specified in paragraph (8) of subdivision (a) of Section 101012 if the project meets the criteria prescribed in that section.

EC Section 101012

(a) The proceeds from the sale of bonds, issued and sold for the purposes of this chapter, shall be allocated in accordance with the following schedule:

...

(4) The amount of five hundred million dollars (\$500,000,000) for the purposes set forth in Article 13 (commencing with Section 17078.70) of Chapter 12.5 of Part 10, relating to facilities for career technical education programs.

...

(8) The amount of one hundred million dollars (\$100,000,000) for incentive grants to promote the use of designs and materials in new construction and modernization projects that include the attributes of high-performance schools, including, but not limited to, the elements set forth in Section 17070.96, pursuant to regulations adopted by the State Allocation Board.

...

Section 1859.193. Career Technical Education Facilities Grant Determination.

...

(a) For new construction of a Career Technical Education Facilities Project included in a qualifying New Construction Grant, the Career Technical Education Facilities grant amount shall be the lesser of either (1) or (2):

(1) The sum of the costs uniquely related to facilities required to provide Career Technical Education as determined below:

(A) 50 percent of the cost of construction of the Career Technical Education Facilities Project, as determined by the project architect, subject to OPSC review and approval.

(B) 50 percent of the cost to equip the Career Technical Education Facilities Project with necessary equipment.

(C) Minus an allowance for New Construction Grants provided for Career Technical Education classrooms, determined by:

1. Multiplying 960 square feet by the number of classrooms in the Career Technical Education Facilities Project that were included in the New Construction project.

2. Multiplying the amount determined in (a)(1)(C)1 by 50 percent of the Current Replacement Cost for non-Toilet Facilities.

(2) \$3 million per Career Technical Education Facilities Project.

...

Note: Authority cited: Sections 17070.35 and 17078.72(k), Education Code.

Reference: Section 17078.72, Education Code.

SFP Regulation Section 1859.199. Program Accountability

...

An applicant district may not retain savings realized by a Career Technical Education Facilities Project.

Note: Authority cited: Sections 17070.35 and 17078.72(k), Education Code.

Reference: Section 17078.72, Education Code.

SFP Regulation Section 107. Amending and Withdrawal of Applications

...

A funding application, with the exception of funding applications identified in Subsection (a) below, submitted to the OPSC that has not received an approval will receive funding under the provisions of the regulations that were in effect when the application was submitted to the OPSC and any funding adjustment authorized by Sections 1859.71.2(c) or 1859.78.4(b). If the funding adjustment is a result of Sections 1859.71.2(c) or 1859.78.4(b), the district must submit an amended Form SAB 50-04. The amended application shall retain its OPSC processing date. At the option of the district, a funding application submitted to the OPSC that

has not received an approval may be withdrawn and resubmitted for SAB approval under the provisions of any amended or new regulation once it is effective. The district must request that the application be withdrawn and removed from the OPSC workload list. The resubmitted application will receive a new processing date by the OPSC.

(a) A district that submitted an Approved Application request for either a Modernization Adjusted Grant or a Separate Design Apportionment for a modernization project pursuant to Section 1859.81.1 that meets the criteria in (1) and (2) below must submit a new Form SAB 50-04 that meets the criteria in Subsections (b) or (c) no later than 60 calendar days after the effective date (September 16, 2002) of this Subsection:

(1) The Approved Application was received by the OPSC after April 29, 2002 but no later than the date this Subsection becomes effective (September 16, 2002).

(2) The Approved Application has not received an approval or has received an approval pursuant to Section 1859.95, but has not received an apportionment.

. . .

Note: Authority cited: Section 17070.35, Education Code.

Reference: Sections 17070.35, 17070.63, 17074.15, 17074.16 and 17074.56, Education Code.

STATE ALLOCATION BOARD
IMPLEMENTATION COMMITTEE MEETING
February 10, 2012

Improvements to the Project Information Worksheet (PIW)

PURPOSE OF REPORT

To discuss potential improvements to the PIW.

DESCRIPTION

The State Allocation Board (Board) directed Office of Public School Construction (OPSC) staff to discuss improvements to the PIW at the Implementation Committee (Committee). This item provides information on the background and purpose of the worksheet for that discussion.

AUTHORITY

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."

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."

BACKGROUND

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

- To analyze the relationship between the pupil grant eligibility and the cost of new construction pursuant to EC Section 17072.11(b).
- To demonstrate bond accountability

- To identify the changes in the bid climate over time.
- To evaluate the High Performance Incentive Grant.

The PIW is based largely on a survey developed by a new construction grant adequacy ad hoc committeeⁱ assembled by the Board in December 2005. The PIW incorporates the Committee's input and was tested by a sample of districts prior to Board approval. At the time of development, stakeholders commented that the PIW should be independent of the *Expenditure Report* (Form SAB 50-06). Various stakeholders/districts provided additional input that the collection of data for the PIW should also include all locally funded expenditures because districts only report the minimum expenditures necessary to establish compliance with the local match requirement on the Form SAB 50-06.

At the March 2011 Board meeting, the Board requested that a discussion of the PIW be placed on the Board Agenda. At the June and July 2011 Board meetings, OPSC staff presented information on 567 new construction projects apportioned from 2008 to 2011, representing 84 percent of all new construction projects that have received a full apportionment during this time. The data presented included pupils housed, square footage built (by construction type), facility component types, and expenditures.

At the January 2012 Board meeting, the Board directed staff to bring a discussion of improvements to the PIW to the Committee.

STAFF ANALYSIS/STATEMENTS

Unique Data Collection

Since the inception of SFP, almost \$19 billion in funded apportionments has been provided to new construction projects. The PIW dataset has a wide range of applications and is a benefit to the State and the taxpayer. It provides transparency as it can allow the voters to see the accomplishments of the bond dollars approved. It can also be used to improve accountability and expand the information provided to the public pursuant to Governor's Executive Order S-02-07.

The public is able to find and view the most recently approved PIW for any SFP project requiring a PIW through the Governor's Bond Accountability website:

http://www.bondaccountability.opsc.dgs.ca.gov/bondac/accountability/in_progress.asp?phase=2 Additionally, at the December 2011 Board meeting, OPSC staff announced that an interactive PIW database was available on both the OPSC website at <http://www.dgs.ca.gov/opsc/Home/PIWReporting.aspx> and the Bond Accountability website. The searchable database allows

ⁱ Grant adequacy ad hoc committee consisted of school districts, architectural, construction, and construction management firms, consultants, the California Building Industry Association, the Department of Finance, the CDE and the Office of Public School Construction.

users to easily access information collected with the PIW, such as funding, expenditures, bond source(s), facilities built, square footage, and much more. Users can also generate customizable PIW data reports, allowing districts and the public to see the results of State school facilities funding. The PIW database includes new construction project information submitted since the PIW was approved in July 2008, and will include information on modernization projects with HPI grants as those projects receive apportionments.

Information and Documents Necessary to Complete the PIW

Although the documentation and sources of information necessary to complete the PIW may vary by district, to complete the worksheet it may be helpful to have the following information available:

- Fiscal records related to the project
- Project files related to the contracting process (bid date, number of bidders, contract amount)
- Project Summary printout from the Project Tracking System found on the OPSC website.
- Project plans and specifications

Other information may be obtained from the architect or the district’s facilities department.

Information Captured by the PIW

The following table compares the general categories of information collected by the PIW with other sources of data collected by the California Department of Education (CDE), the Division of the State Architect (DSA) and by the OPSC on the *Application for Funding and Expenditure Report* (Forms SAB 50-04 and 50-06). Information obtained from CDE and DSA was verified by the respective agencies.

Information Reported		PIW	CDE	DSA	Form SAB 50-04	Form SAB 50-06
Project Funding						
State Apportionment & Interest Earned Information		X				X
Local Contribution Beyond Required Match		X				
Costs Covered by Joint Use Partner		X				
Project Information						
Square Footage by Facility Component Type (Classrooms, Library, etc.)	Initial Plan Submittal		X ⁱⁱ			
	Final Construction Contracts	X				
Square Footage by Building Construction Type (Permanent, Portable, Modular)		X				
Number of Outdoor & Sporting Facilities by Type; Parking Lot Square Footage		X				
Re-Use of Architectural Plans		X				

ⁱⁱ The CDE requests square footage for educational facilities in the initial plan submittal. Some square footage, such as janitorial space, restroom square footage, etc., may not be collected.

Information Reported	PIW	CDE	DSA	Form SAB 50-04	Form SAB 50-06
Project Information (continued)					
Local Requirements Not Funded by State	X				
School Type (Example: Elementary, Charter, Special Education, Etc.)	X	X	X	X	
Net Useable Site Size	X	X		X	
Master Plan Site Capacity of Project	X	X		X	
Project Costs					
Total Costs for Site Acquisition	X			X	X
Building Construction Costs in Contract(s) - Broken out Separately	X				
Site Development Costs – Broken Out Separately	X			X ⁱⁱⁱ	
Other Hard Construction Costs (Interim Housing, Demolition, General Conditions Costs)	X				X
Soft Costs (Tests, Inspections, Architect Fees, Consultant Fees)	X				X
Construction Management Costs	X				X
Contingency Costs	X				
Additive/Deductive Alternates including Description	X				
Bid Date/Number of Bidders	X				
Modifications Due to Cost	X				
Lump Sum Construction Contract Amount	X		X		
High Performance Incentive Grant					
Differential Costs of Achieving High Performance	X				
Energy Savings Information	X				
Student Achievement Information	X				
Other High Performance Benefits Realized	X				

Areas for Improvement

OPSC staff has heard a wide range of concerns regarding the current form of the PIW from district staff who call in with questions about how to fill out the PIW, and from feedback received from various stakeholders at Board and Committee meetings. Here are some of the concerns identified:

- Compiling the required information and filling out the PIW is time-consuming.
- There is limited value in submitting the PIW three separate times for one project.
- For projects that are funded from both the SFP New Construction and the Modernization programs, it is difficult to isolate the costs associated solely with the new construction project scope, as required to complete the form.
- Data collected for a project may include modernization funding where only new construction is supposed to be reported. The data collected is not accurate because districts are required to split out any portion of a project that may have received modernization funding.

ⁱⁱⁱ The 50-04 captures the estimated site development costs eligible for SFP new construction grants. The PIW captures the actual site development costs, even if the costs are not eligible for SFP new construction grants.

- Some of the PIW information is also collected through other OPSC forms.
- Some of the questions are not always clear as to what information is being requested.
- Concerns have been raised that some of the questions in the new High Performance Incentive Grant Information section are difficult to quantify.

Proposed Changes

OPSC staff has identified some potential changes including:

- Reducing the information requested in the “Project Funding” section to the State Apportionment alone (this figure is used to verify that the district is reporting data for the correct project number).
- Reorganizing the “Project Cost” section to more closely mirror the categories in the *Expenditure Report*, SAB Form SAB 50-06.
- Adding a text field to the “Project Information” section in which the district will be able to identify “Other” component types.
- Changing the form so that certain numbers are automatically calculated based on data reported in other fields on the form.
- Adding questions related specifically to renewable energy systems, such as the cost of any new renewable energy generation system, the kilowatts (kW) that the new system will generate, and the anticipated energy cost savings.

Additional changes are also being considered; however, OPSC staff is seeking input from the Committee and other stakeholders to improve the worksheet.

PROJECT INFORMATION WORKSHEET

(rev 5/2010)

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:

	AMOUNT	ESTIMATE	ACTUAL
a. Total Amount of State Apportionment(s):.....	\$	<input type="checkbox"/>	<input type="checkbox"/>
1. Project:.....	\$	<input type="checkbox"/>	<input type="checkbox"/>
2. Joint-Use (if applicable):.....	\$	<input type="checkbox"/>	<input type="checkbox"/>
b. Interest Earned on State Apportionment for this project:	\$	<input type="checkbox"/>	<input type="checkbox"/>
c. Total District Match:	\$	<input type="checkbox"/>	<input type="checkbox"/>
1. Project:.....	\$	<input type="checkbox"/>	<input type="checkbox"/>
2. Joint-Use (if applicable):.....	\$	<input type="checkbox"/>	<input type="checkbox"/>
d. Additional Local Funds Necessary to Complete State Funded Project:	\$	<input type="checkbox"/>	<input type="checkbox"/>

PROJECT COSTS

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

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

Project Type School Type

Master Plan Site Capacity of project <i>(Based on single-track use and local district loading standard):</i>	
Square footage of parking structure <i>(If applicable):</i>	
Net Useable Site Size <i>(Acres):</i>	

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	
<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 <small>(CHOOSE FROM PULL DOWN MENU)</small>	SQUARE FOOTAGE FROM DSA APPROVED PLAN	FUND RELEASE (FIRST REPORT) SQUARE FOOTAGE	FIRST ANNUAL REPORT	FINAL EXPENDITURE REPORT
<i>(Complete if applicable)</i>	NUMBER				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>						
Total:						

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

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

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 _____

HIGH PERFORMANCE INCENTIVE GRANT INFORMATION

1. Is this a Financial Hardship Project? Yes No

2. Number of HPRC Points attained: _____

	AMOUNT	ESTIMATE	ACTUAL
3. Total State Apportionment:.....	\$	<input type="checkbox"/>	<input type="checkbox"/>
a. State Share HPI:.....	\$	<input type="checkbox"/>	<input type="checkbox"/>
4. Total District Match:	\$	<input type="checkbox"/>	<input type="checkbox"/>
a. Total HPI Match.....	\$	<input type="checkbox"/>	<input type="checkbox"/>

5. Differential Hard Costs of achieving High Performance:

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

	AMOUNT	ESTIMATE	ACTUAL
1. Energy Savings:.....	\$	<input type="checkbox"/>	<input type="checkbox"/>

Description of Energy Savings _____

2. Student Achievement _____

3. Other Benefits realized _____
