

STATE ALLOCATION BOARD
IMPLEMENTATION COMMITTEE MEETING
October 12, 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.

AUTHORITY

See Attachment A

BACKGROUND

The Board approved the PIW in September 2007 and modified it in May 2010 (see Attachment B). 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)¹
- 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

¹ 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.

site-wide basis, building information (number of classrooms, type of construction, original year the building was built, square footage of the building, etc.), and work information (roofing, HVAC, plumbing, etc.) on a building-by-building basis.

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.

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, 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 contains some of the same fields as the existing project information page (now labeled “project information – new construction”).

New modernization fields include:

- a box where districts will indicate the type of work the project involves (sitework, roofing, HVAC, plumbing, etc.), how much was spent on each type

of work, and whether that amount is the estimated or actual amount. (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 indicate what facilities were modernized.

NEXT STEPS

Identify improvements to the PIW shown in Attachment C.

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. . . ."

ATTACHMENT A

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."

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 (FCRM 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 (State share & District amount):	\$	<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 (Interim Housing, Demolition, General Conditions, if applicable):	\$	<input type="checkbox"/>	<input type="checkbox"/>
3. Soft Costs (e.g., tests and inspections, architect fees, etc.):	\$	<input type="checkbox"/>	<input type="checkbox"/>
4. Estimated Remaining Project Cost Not Yet Contracted (Hard Costs):	\$	<input type="checkbox"/>	<input type="checkbox"/>
5. Construction Management Fees (General Conditions, if applicable):	\$	<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) _____

ATTACHMENT B

PROJECT INFORMATION

Project Type School Type

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	NUMBER
<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	

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>	

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 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

1. Energy Savings:..... \$ _____ ESTIMATE ACTUAL

Description of Energy Savings _____

2. Student Achievement _____

3. Other Benefits realized _____

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"/>
\$	<input type="checkbox"/>	<input type="checkbox"/>

JOINT-USE INFORMATION

- 1. Did the project include a Joint-Use partner? Yes No
- 2. Which type of Joint-Use partner did it include? Non-Profit Government Higher Education Other (Explain) _____
OPSC Application Number (if applicable): _____
- 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)

ATTACHMENT C

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES

STATE ALLOCATION BOARD

PROJECT INFORMATION - NEW CONSTRUCTION

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 (Acres):	

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 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
\$	\$

PROJECT INFORMATION WORKSHEET

(Rev 5/2010 10/2012)

ATTACHMENT C

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES

STATE ALLOCATION BOARD

PROJECT INFORMATION - MODERNIZATION

School Type

Total Classrooms on Site

Total Pupils Served on Site

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

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"/> 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 (Explain)	

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

Total Modernization 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: _____
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 _____
- _____
- _____
- _____
- _____

ATTACHMENT D

INSTRUCTIONS FOR PIW: Project Information-Modernization

- Choose from the drop down menu the type of school that best describes the school project (e.g. elementary, middle, etc.).
- Enter the total number of classrooms on the entire school site.
- Enter the total number of pupils served on the entire school site.

Facilities Modernized

- Select what facilities you have modernized and how many of each are in the project. If the facility is considered multiple use, check the box that best represents what the modernized facility will be used for the majority of the time. If the project consists of any other facilities not listed, check “other” and explain.

Types of Work

- Choose all types of work that are included in the project. For each type of work, enter the actual or estimated project cost.

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. 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.