

2013 Green California Schools Summit & Exposition

High Performance Incentive Grants for
Charter School and Seismic Mitigation
Program Projects.

Presented By:

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Background On High Performance Incentive (HPI) Grants

- \$38.4 million still available as of November 1, 2013.
- Supplemental grant to a larger State funded construction project, not stand alone.
- HPI grants are an incentive to promote the use of high performance attributes in school buildings.

Background On HPI Grants

Currently modeled after the 2009 CA-Collaborative for High Performance Schools Criteria

High Performance Rating Criteria categories:

- Site
- Water
- Energy
- Materials
- Indoor Environmental Quality

Background On HPI Grants

- Request a Division of the State Architect HPI review during plan approval process.
- Submit HPI Scorecard (from DSA) to OPSC with funding application.
- Incorporates current California Green Code requirements.

Background On HPI Grants

How the funding works

- HPI grants are calculated in two parts:
- Part 1 – percentage increase to project base construction grant. More points means a higher percentage increase.
- Part 2 – High Performance Base Incentive Grant (HPBIG):
 - \$150,000 for new school projects.
 - \$250,000 for new construction addition and modernization projects.
 - Only one HPBIG per school site.
- Average HPI grant is in excess of \$325,000. Dependent on size and scope of project.

Seismic Mitigation Program

- Provides funds for the seismic repair, reconstruction or replacement of most vulnerable school buildings.
- At the May 22, 2013 State Allocation Board meeting, regulations were approved to allow HPI grants for Seismic Mitigation and Facility Hardship projects.
- Regulations expected to be effective January 1, 2014.

Seismic Mitigation Program

Application Components – SMP

- *Application for Funding* (Form SAB 50-04)
- Structural Engineer's report
- DSA or other Government entity concurrence letter (agrees with Structural Engineer's report)
- Geological Report (if applicable)
- Detailed Cost Estimate
- Cost Benefit Analysis (should not include HPI work)
- Photos / School Site Diagram

Seismic Mitigation Program

Application Components – SMP

- DSA Final Plan Approval Letter
- DSA Approved Plan Set
- CDE Final Plan Approval Letter
- Site Development Worksheet (if requesting site development)
- HPI-1 form from DSA if requesting HPI grants
- Career Technical Education Advisory Committee certification

Seismic Mitigation Program

- Currently \$170.4 million in remaining program bond authority.
- Projects submitted to the OPSC after regulations are effective can request HPI grants with an approved HPI scorecard from DSA.
- Contact OPSC Seismic Mitigation and Facility Hardship Team for additional details.
(Contact info at end of presentation)

Charter School Facilities Program

- HPI grants are already allowable in CSFP projects.
- Provides charter schools funding to construct new charter facilities and/or rehabilitate existing district-owned facilities that are at least 15 years old for charter school use.
- Applications can come from the charter school or school district where the charter school is physically located.
- Either entity may hold title to the project facilities.

Charter School Facilities Program

- Must have financial soundness approved by California School Finance Authority (CSFA).
- 50% district matching share for project may be borrowed through a 30-year loan from the State.

Charter School Facilities Program

- Charter schools are granted a reservation of funds or “preliminary apportionment” and have four years to convert to a final project.
- Preliminary apportionments are submitted during filing rounds as approved by the State Allocation Board.
- Filing rounds are typically 60-90 days.
- Applications are prioritized and funded based on preference points and a funding matrix.

Charter School Facilities Program

- Preference points are given to preliminary apportionment applications based on; overcrowding, low income status, if the project is rehabilitating existing facilities and if the charter is nonoprofit.
- Projects are ranked in a matrix that takes into account charter region (4 regions), if the project is urban, suburban or rural, if the district is small, medium or large and also the grade level of the project.

Charter School Facilities Program

Components of a preliminary apportionment package include:

- *Application for Preliminary Apportionment* (Form SAB 50-09)
- Financial Soundness Application from the California School Finance Authority
- Narrative of the proposed project
- Approved Charter petition
- Verification of non-profit status (if applicable)
- California Department of Education estimated recommended site size letter

Charter School Facilities Program

Components of a preliminary apportionment package continued:

- Methodology and certification for determining the number of unhoused students the project will serve
- Appraisal of the property being acquired or median cost valuation in per-acre format
- Other supporting documentation, as applicable

Charter School Facilities Program

Conversion Application Components – CSFP

- *Application for Funding* (Form SAB 50-04)
- DSA Approved Plans and Specifications
- DSA Final Plan Approval Letter
- CDE Final Plan Approval Letter
- Cost Estimate for Site Development (New Construction)
- Appraisal, Escrow Closing Statement and CDE Site Approval Letter, if acquiring land (New Construction)
- Accessibility/Fire Code Requirements Checklist (Rehabilitation)

Charter School Facilities Program

Conversion Application Components – CSFP

- Cost Estimate (Rehabilitation)
- HPI-1 form from DSA if requesting HPI grants
- Career Technical Education Advisory Committee certification
- Determination of Financial Soundness from the CSFA

Charter School Facilities Program

- Remaining bond authority as of November 12, 2013 (pending approval of conversions) is \$86.0 million.
- With potential Proposition 1D charter project rescissions, CSFP bond authority could potentially be as high as \$96.3 million.
- SAB will be discussing the possibility of a future funding round soon.
- New funding round (if approved) will most likely be in early 2014.

Contact Information

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Questions?