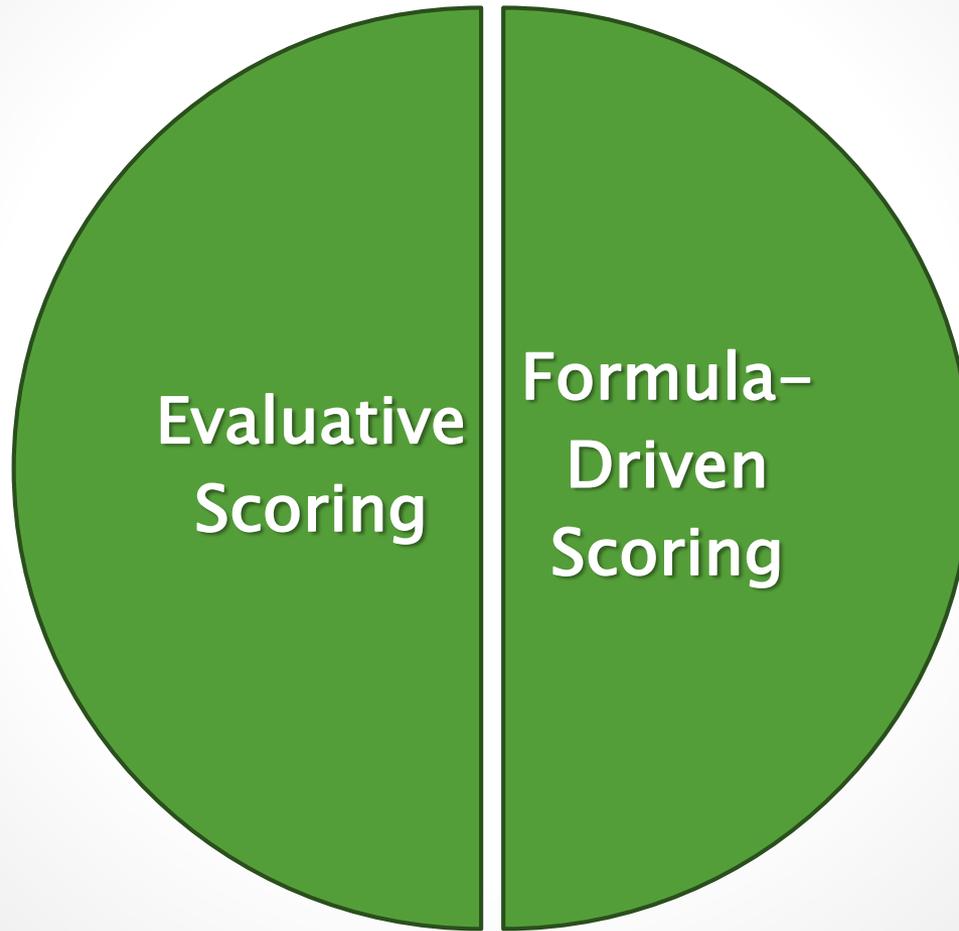


FY18 CIP Grant Application Scoring

Department of Education & Early
Development

Presentation Overview

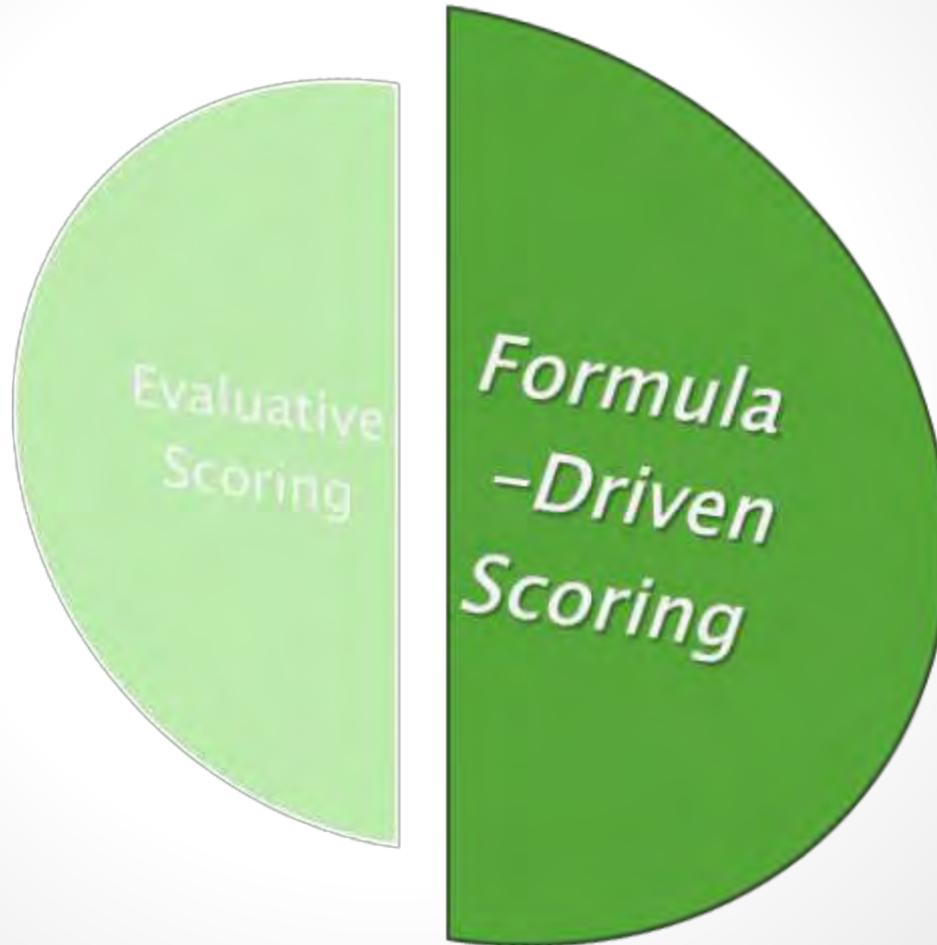


Maintenance Points List Example

**Alaska Department of Education and Early Development
Capital Improvement Projects (FY2017)
Major Maintenance Grant Fund
Total Points - Formula-Driven and Evaluative
Final List**

Pr #	School District	Project Name	Sched Est Start	Weight Avg Age	Pres 14:11 Fund	Plan and Design	Avg Essential Mgmt	Un- Housed Today	Un- Housed 7 Years	Type of Space	Cond Survey	Maint Labor	Maint Type	Maint Mgt	Energy Mgt	Cost Pipe	Maint Track	Capital Plan	Emer- gency	Life/Safety and Code Conditions	Exist- ing Score	Cost Esti- mate	Proj vs Oper Cost	Alter- na- tives	Op- tions	Total Points
1	Kake City	Kake Schools Boiler #2 Replacement	30.00	21.84	0.00	25.00	1.36	0.00	0.00	0.00	0.00	15.00	10.00	5.00	4.67	3.33	4.00	4.00	0.00	19.00	0.00	26.33	26.67	0.00	13.00	213.20
2	Petersburg City	Petersburg Middle/High School Primary Boiler Replacement	30.00	29.53	0.00	25.00	1.18	0.00	0.00	0.00	10.00	15.00	10.00	3.33	4.67	4.67	4.67	4.00	0.00	15.67	0.00	26.00	16.33	0.00	12.00	213.04
3	Bristol Bay Borough	Bristol Bay School Energy Upgrades and Renovations	30.00	24.36	0.00	20.00	1.66	0.00	0.00	0.00	10.00	15.00	10.00	4.00	4.33	4.33	3.67	4.67	0.00	26.33	0.00	21.67	12.00	0.00	17.67	209.69
4	Galena	Galena Interior Learning Academy Headquarters Classroom Building Renovation	30.00	14.25	0.00	25.00	4.60	0.00	0.00	0.00	10.00	15.00	10.00	4.67	4.00	4.00	4.67	3.67	0.00	25.00	8.33	23.33	5.67	0.00	17.00	209.18
5	Denali Borough	Anderson K-12 School Water Line Replacement	30.00	23.06	0.00	25.00	4.01	0.00	0.00	0.00	0.00	15.00	10.00	4.67	4.00	4.33	5.00	4.67	11.67	17.00	0.00	29.00	4.33	0.00	12.00	203.73
6	Aleutians East	Sand Point K-12 School Heating System Renovation	30.00	15.07	0.00	25.00	1.96	0.00	0.00	0.00	8.00	15.00	10.00	3.00	3.33	2.33	2.67	2.67	0.00	16.67	0.00	26.00	26.00	0.00	10.00	201.89
7	Fairbanks	Barnette Magnet K-8 School Renovation Phase 4	30.00	30.00	0.00	25.00	3.79	0.00	0.00	0.00	0.00	15.00	10.00	3.33	2.67	4.00	2.33	2.33	0.00	24.67	3.00	26.67	8.00	0.00	10.00	200.79
8	Craig City	Districtwide Energy Upgrades	30.00	8.18	0.00	25.00	2.83	0.00	0.00	0.00	0.00	15.00	10.00	4.00	4.67	4.00	3.67	4.00	0.00	16.00	0.00	26.00	26.00	0.00	14.33	196.88
9	Saint Marys	St. Mary's Campus Upgrades	30.00	29.81	0.00	25.00	1.25	0.00	0.00	0.00	10.00	15.00	10.00	5.00	4.00	5.00	3.00	4.00	0.00	12.00	0.00	26.00	5.00	0.00	10.33	196.40
10	Annette Island	Mellakella High School Kitchen Renovation	30.00	30.00	0.00	25.00	1.88	0.00	0.00	0.00	10.00	15.00	10.00	2.00	3.00	2.67	2.67	2.67	0.00	18.33	0.00	26.00	2.33	0.00	11.67	195.22
11	Petersburg City	Districtwide Food Service Renovations	27.00	30.00	0.00	25.00	1.18	0.00	0.00	0.00	10.00	15.00	10.00	3.33	4.67	4.67	4.67	4.00	0.00	12.00	0.00	24.67	4.00	0.00	14.33	194.51
12	Chatham	Tenakee K-12 School Roof Replacement	30.00	11.00	0.00	25.00	1.58	0.00	0.00	0.00	5.00	15.00	10.00	3.33	3.33	3.33	2.67	3.00	0.00	27.33	0.00	26.00	2.67	0.00	16.67	189.89
13	Chatham	Kluwan K-12 School Boiler Replacement	27.00	16.00	0.00	25.00	1.56	0.00	0.00	0.00	5.00	15.00	10.00	3.33	3.33	3.33	2.67	3.00	8.67	21.33	0.00	29.00	4.00	0.00	10.67	188.86
14	Southeast Island	Thome Bay Maintenance Building Roof Replacement	27.00	30.00	0.00	30.00	2.56	0.00	0.00	0.00	10.00	15.00	10.00	3.33	4.67	3.00	2.67	3.33	0.00	25.33	0.00	16.67	3.67	0.00	10.67	187.89
15	Lower Kuskokwim	Bethel Campus Fire Pumphouse & Fire Protection Upgrades	15.00	30.00	0.00	20.00	3.13	0.00	0.00	0.00	10.00	15.00	10.00	4.33	4.00	3.00	3.67	4.33	0.00	26.33	0.00	20.00	4.00	0.00	14.67	187.46
16	Yukon-Koyukuk	Atkasat K-12 School Renovation	27.00	20.37	0.00	20.00	2.81	0.00	0.00	0.00	10.00	15.00	10.00	3.67	2.33	3.00	2.00	3.00	0.00	23.00	5.00	19.67	2.33	0.00	16.00	187.16
17	Petersburg City	Petersburg High School Gym & Auxiliary Gym LED Lighting Upgrade	18.00	15.84	0.00	25.00	1.16	0.00	0.00	0.00	8.00	15.00	10.00	3.33	4.67	4.67	4.67	4.00	0.00	4.00	0.00	26.33	27.67	0.00	10.00	184.15
18	Kuspuk	Jack Eignety Sr. K-12 School Roof Replacement Steamute	30.00	21.25	0.00	25.00	1.75	0.00	0.00	0.00	0.00	15.00	10.00	2.33	2.33	2.00	2.33	1.67	10.67	18.33	2.67	16.00	9.00	0.00	13.00	183.33
19	Valdez City	Hermon Hutchens Elementary Fire Alarm, Clock, Intercom Replacement	30.00	21.25	0.00	25.00	2.28	0.00	0.00	0.00	3.00	15.00	10.00	3.67	3.33	3.00	3.00	4.00	0.00	14.00	0.00	29.33	3.67	0.00	9.33	179.86

Presentation Overview



**Alaska Department of Education & Early Development
Capital Improvement Project Application
Formula-Driven Rating Form**

Adopted by the Bond Reimbursement and Grant Review Committee

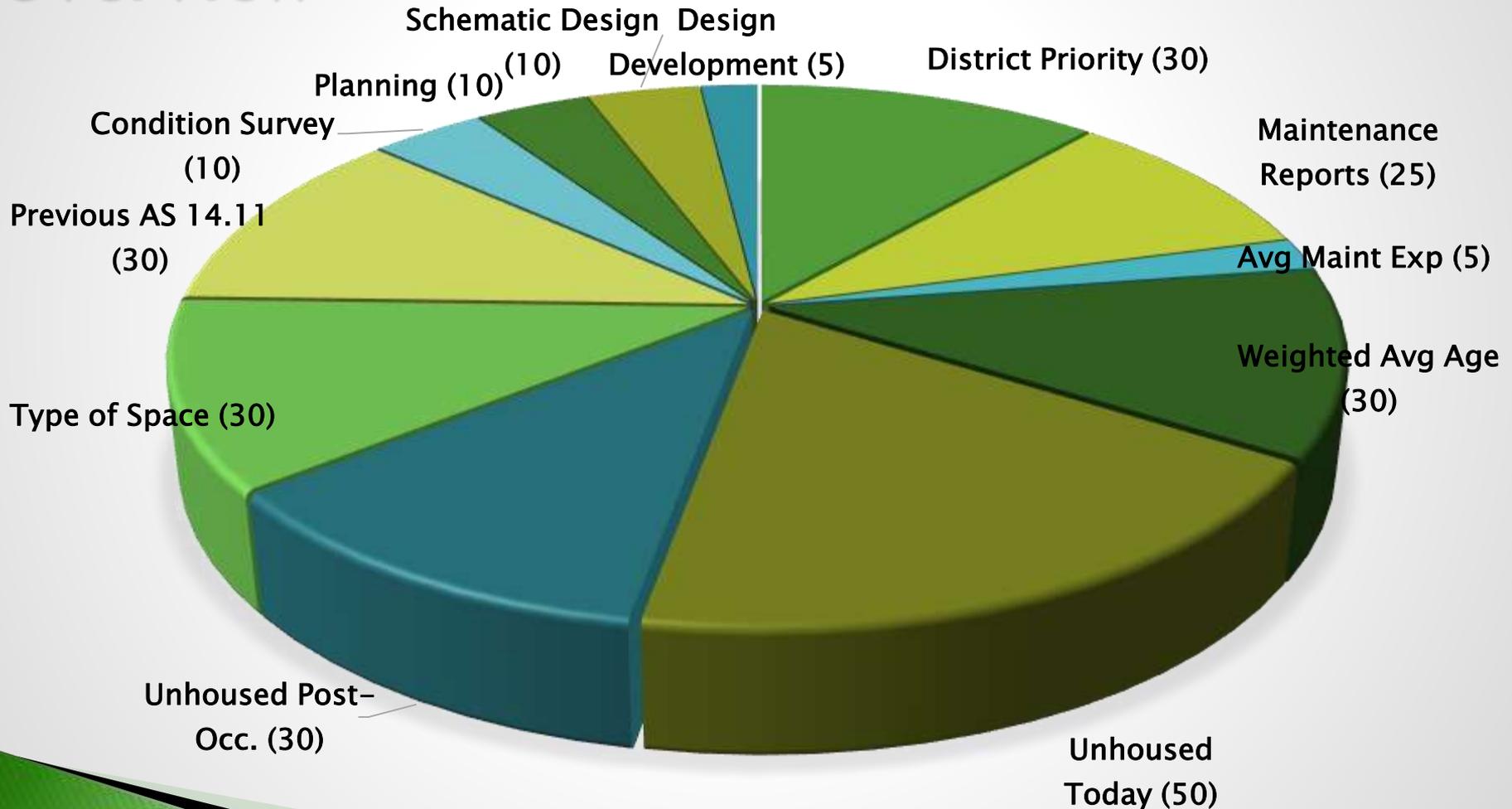
School District _____ Date _____
 School Name _____
 Project Title _____
 Fund _____ Category _____
 Phase _____ Maximum Points _____

Max Points		School Construction A, B, F	Major Maintenance C, D, E
10	1. Condition/Component Survey (Question 6a) Condition survey = 3, 5, 8, or 10 points		
30	2. District ranking (Question 3a) Project #1 request = 30 points, #2 = 27 points, #3 = 24 points. Each additional project 3 points less.		
30	3. Weighted average age of facility (Question 3b) A. 0-10 years = 0 points B. = 10 <20 years = .5 / year in excess of 10 years C. = 20 <30 years = 1 + .75 per year in excess of 20 years D. >30-40 years = 12.5 + 1.75 per year in excess of 30 years E. > 40 years = 30 points		
30	4. Previous AS 14.11 funding for this project (Questions 6e & 7a) Previous funding = 30 points No previous funding = 0 points		
25	5. Planning & design phase has been completed (Question 6b-6e and Appendix B) A. All required elements of planning = 10 points B. All elements planning + required elements of schematic design = 20 points C. All elements of planning and schematics + required elements of design development = 25 points		
50	6. Unhoused students today (Questions 5a-5g) A. 100% of capacity = 0 points B. = 100% of capacity - One point for each 3% of excess capacity C. 250% of capacity = 30 points		10A
30	7. Unhoused students in seven years (5 year Post-occupancy) (Questions 5a-5g) A. 100% of capacity = 0 points B. = 100% of capacity - One point for each 3% of excess capacity C. 250% of capacity = 30 points		10A
30	8. Type of space added or improved (Question 5f) A. Instructional or resource 30 points B. Support teaching 25 points C. Visual, service, recreational, and general support 15 points D. Supplemental 10 points		10A

Formula-Driven Rating Form (continued)

Max Points		School Construction A, B, F	Major Maintenance C, D, E
30	9. Preventive Maintenance (Question 6f) A. Maintenance Management Program 1. Detailed summary reports of maintenance (lab) parameters = 15 points 2. Detailed summary reports of PM/conductive maintenance parameters = 10 points 3. The 5-year average expenditure for maintenance (divided by the 5-year average unmet replacement/repair, district wide) = 5 points If % > 8, then (% x 1.25) If % > 4, then 5		
205	Total Points		

Formula-Driven Scoring: Overview



Formula-Driven Scoring: Overview

- ▶ Based on information submitted in:
 - CIP application
 - Annual district submittals to DEED
- ▶ Information verified with DEED files:
 - Historical files
 - Facilities database

Formula-Driven Scoring: Overview

FY17 CIP Application Changes

Item	FY16 Points	FY17 Points
Facility Appraisal	5	0
Condition Survey	5	0,3,5,8,or10
Design Development	10	5
Total Possible Formula-Driven Points	270	265

Formula-Driven Scoring: District Priority - Question 3a

- ▶ District Priority –
 - The unique number given to each project in a priority sequence approved by the district school board
 - DEED will not accept two projects with the same ranking
 - Ten award levels
 - 30 points for number one priority project
 - 3 points for number ten priority project

Formula-Driven Scoring: Weighted Average Age - Question 3b

- ▶ **Weighted Average Age Scoring –**
 - Multiple award levels with four tiers
 - A. 0–10 years = 0 points
 - B. $> 10 \leq 20$ years = 0–5 points available
 - C. $> 20 \leq 30$ years = 5.75 – 12.5 points available
 - D. $> 30 < 40$ years = 14.25 – 28.25 points available
 - E. ≥ 40 years = 30 points

Formula-Driven Scoring: Condition Survey - Question 6a

- ▶ **Condition/Component Survey**
 - **Facility Condition or Component Survey – 10 Points;**
 - A technical survey of facilities and buildings to determine compliance with standards and codes for safety, maintenance, repair and operation;
 - This report follows any accepted format
 - Survey may be completed by architect, engineer or persons with documented expertise (report expertise in 6e – Planning/Design Team).

Formula-Driven Scoring: Condition Survey - Question 6a

Criteria	Points
Comprehensive survey that informs the project and includes a full description of existing systems and code deficiencies. Recommendations and costs to renovate are included along with supplemental information such as special inspections, photographs, drawings, and engineering calculations as applicable. It is less than 6 years old.	10
Many of the elements listed above; less than 10 years old.	8
Survey informs the project, but supplements that would further document conditions are not provided or not substantial; it is less than 10 years old.	5
Survey is more than 10 years old, but may still contain relevant information.	3
Survey not submitted or does not inform project.	0

Formula-Driven Scoring: Planning

- ▶ Facility appraisal
 - An assessment of facilities and buildings to determine adequacy with respect to educational concerns.
 - **Optional; no longer scored.** Include if available, it is valuable for informing the raters about the project.

Formula-Driven Scoring: Planning & Design - Section 6

- ▶ Planning & design points: 3 award levels
 - A. Planning/Concept Design complete 10 pts
 - B. Design:35% (schematic design) complete 20 pts
 - C. Design:65% (design development) complete 25 pts

- ▶ Need for design phase is determined by DEED

- ▶ Deliverables are identified in Appendix B of Instructions

Alaska Department of Education & Early Development
APPENDIX B: CAPITAL IMPROVEMENT PROJECT PHASES
Adopted by the Bond Reimbursement & Grant Review Committee
September 10, 2014

The application form requires designation of the phase(s) for which the district requests funding. Below is a basic scope of effort for each phase. Items marked **Required** are mandatory (where project scope dictates) in order for projects to receive planning, schematic design and/or design development points. Required documents must be submitted by September 1st.

CONDITION/COMPONENT SURVEY (0 to 10 points possible)

PHASE I - PLANNING/CONCEPT DESIGN (0 or 10 points possible)

1. Select architectural or engineering consultants (4 AAC 31.065) - **(Required if necessary to accomplish scope of project)**
2. Prepare a school facility appraisal (optional)
3. Include a condition/component survey as referenced above - **(Required if project is a major rehabilitation)**
4. Identify need category of project - **(Required)**
5. Verify student populations and trends - **(Required for new facilities and additions to existing facilities)**
6. Complete education specifications (4 AAC 31.010) - **(Required for new facilities, additions, and major rehabilitations to existing facilities)**
7. Identify site requirements and potential sites - **(Required for new facilities)**
8. Complete concept design studies and planning cost estimate - **(Required)**

PHASE IIA - SCHEMATIC DESIGN - 35% (0 or 10 points possible)

1. Perform site evaluation and site selection analysis (4 AAC 31.025) - **(Required for new facilities)**
2. Prepare plan for transition from old site to new site, if applicable - **(Required for new facilities)**
3. Accomplish site survey and perform preliminary site investigation (topography, geotechnical) - **(Required for new facilities)**
4. Obtain letter of commitment from the landowner allowing for purchase or lease of site - **(Required for new facilities)**
5. Complete schematic design documents including development of approximate dimensioned site plans, floor plans, elevations and engineering narratives for all necessary disciplines - **(Required)**
6. Complete preliminary cost estimate appropriate to the phase - **(Required)**
7. Accomplish a condition survey relevant to scope - **(Required if project is a major rehabilitation)**

PHASE IIB - DESIGN DEVELOPMENT - 65% (0 or 5 points possible)

1. Complete suggested elements of planning design not finished in the previous phases - **(Required)**
2. Review and confirm planning (4 AAC 31.030)
3. Accomplish a condition/component survey relevant to scope - **(Required if project is a major rehabilitation)**
4. Obtain option to purchase or lease site at an agreed upon price and terms - **(Required for new facilities)**
5. Complete design development documents, including dimensioned site plans, floor plans, complete exterior elevations, draft technical specifications, and engineering plans - **(Required)**
6. Prepare proposed schedule and method of construction
7. Prepare revised cost estimate appropriate to the phase - **(Required)**
8. Energy consumption and cost report

¹Under 4 AAC 31.000(7) "rehabilitation" means adapting an existing facility to improve the opportunity to provide a contemporary educational program, and includes major remodeling, repair, renovation, and modernization with related capital equipment.

Formula-Driven Scoring: Unhoused Students - Section 5

Attendance Area & Average Daily Membership

- ▶ Capacity calculations are based on the attendance area where the project will be constructed
- ▶ Annually, the department publishes a current attendance area list

Formula-Driven Scoring: Questions 5a - 5b

- ▶ 5a – Enter the grade levels housed by the proposed project facility
- ▶ 5b – Identify any work (other than the project in the application) that is taking place in the attendance area impacted by the proposed project

Formula-Driven Scoring:

Questions 5c - 5d

- ▶ 5c – Identify any schools that house students in the same grade levels as in the requested project
- ▶ 5d – Identify the anticipated date of occupancy for the project (attach a schedule if available)

Formula-Driven Scoring: Percent Capacity Today

- Questions 5c & 5e

- ▶ This element assesses the capacity of current/funded school space to house students at current ADMs
- ▶ Point assignments:
 - A. 100% of capacity = 0 points
 - B. >100% of capacity = 1 Point for each 3% of excess capacity;
 - C. 250% of capacity = 50 points

ADM Projection Comparison

School District: Yupik
 School Name: Akia School
 Project Number: 13-001
 School Type: K-12
 Attendance Area: Akia

2016 ADM Year



Historical Attendance Area ADM by Fiscal Year

	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	Average Annual ADM Change	Overall ADM Growth
Attendance Area	96.75	101.00	112.50	113.15	106.65	102.55	108.10	108.15	115.55	2.38%	19.43%

Future School ADM Projections by School Year

	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	Average Annual ADM Change	Overall ADM Growth	
District's K-6 Projection	-	69.31	70.95	72.64	74.37	76.13	77.94	79.79	81.69	2.38%	20.66%
District's 7-12 Projection	-	48.99	50.15	51.34	52.56	53.81	55.09	56.40	57.74	2.38%	20.66%
EED's K-6 Projection	-	69.31	70.95	72.64	74.37	76.13	77.94	79.79	81.69	2.38%	20.66%
EED's 7-12 Projection	-	48.99	50.15	51.34	52.56	53.81	55.09	56.40	57.74	2.38%	20.66%

Future school projections based on school ADM population for the 2015-2016 school year of:

67.70 K-6 students
 47.85 7-12 students

Note: District projection numbers shown in italics were not provided by the school district.

Printed: 5/9/2016

File Name: _ADMisterFY18 ADM SF Combined wSec+6 -Use.xls

Worksheet: ADM

Allowable Gross Square Footage



District: Yupik
 School: Akiak School
 Project Number: 18-006
 School Type: K-12

Projected ADM (K-5):	81.89	#
Projected ADM (7-12):	57.74	#
Existing DEED designated GSF	29,659	SF ^A
Existing GSF To Remain:	29,659	SF
Additional GSF Requested		
Total GSF Proposed:	29,659	SF
Eligible Base GSF	18,839	SF
Eligible Supplemental GSF	15,278	SF
Total GSF Eligible:	34,117	SF
Additional GSF Allowable	4,458	SF
Additional GSF Reduction	No Reduction	

Current Capacity and Unhoused	
	District: Yupik
	School: Akiak School
	Project Number: 18-xxxx
	School Type: K-12
Current ADM (K-6):	87.70
Current ADM (7-12):	47.95
Existing GSF:	29,659 SF
Existing GSF Elementary Capacity:	67.26
Existing GSF Secondary Capacity:	47.54
Existing Base GSF:	15,512 SF
Existing Supplemental GSF:	14,147 SF
Existing GSF Serving Total ADM:	39,659 SF
Unhoused Students:	0.74
Current Percent Capacity:	100.65%

Projected Capacity and Unhoused	
	District: Yupik
	School: Akiak School
	Project Number: 18-000
	School Type: K-12
Projected ADM (K-6)	81.69
Projected ADM (7-12)	57.74
Existing GSF	29,659 SF
Existing GSF Elementary Capacity:	67.26
Existing GSF Secondary Capacity:	47.54
Existing Base GSF	15,512 SF
Existing Supplemental GSF:	14,147 SF
Existing GSF Serving Total ADM	29,659 SF
Unhoused Students	24.62
Projected Percent Capacity:	121.44%

Formula-Driven Scoring: Percent Capacity 5yr Post-Occ.

- Question 5e

- ▶ This element assesses the capacity of current/funded school space to house students at projected ADMs

- ▶ Point assignments:
 - A. 100% of capacity = 0 points
 - B. >100% of capacity = 1 Point for each 5% of excess capacity
 - C. 250% of capacity = 30 points

Formula-Driven Scoring: Type of Space Added/Improved -

Question 5i

- ▶ Use Appendix D to application instructions for space categories:
 - Four Space Types
 - Instructional or resource 30 pts
 - Support teaching 25 pts
 - Food service, recreational, gen. support 15 pts
 - Supplemental 10 pts
 - 30 points maximum; scoring is weighted for space combinations;
 - School Construction projects only; categories A, B or F

Formula-Driven Scoring: Type of Space Added/Improved - Question 5i

Project Space Equation

- ▶ Table 5.2 applies to all School Construction projects that add space or change utilization of existing space.
- ▶ It is helpful information for projects that are major rehabilitations, although no formula-driven points are awarded for completion.

Formula-Driven Scoring: *Type of Space Added/Improved -* *Question 5i*

Project Space Equation (cont.)

- ▶ Tell us what space you have:
 - How space is allocated by use (ref. Appendix D)
 - Totals from questions #3b and #7a should match
- ▶ What space is being renovated
- ▶ What new space is being built
- ▶ What space is being demolished or surplus

Formula-Driven Scoring:

Type of Space Added/Improved -

Question 5i

- ▶ The amount of space to remain “as-is” column, *plus* the amount of space to be renovated, *minus* existing space to be abandoned or demolished, *plus* the new or additional space, *equals* total space when project is completed.

ALL PROJECTS CONTINUE FROM THIS POINT

5. **Project space utilization** (Up to 30 points)

Completion of this table is **mandatory for all projects that add space or change existing space utilization**. If the project does not alter the configuration of the existing space, it is not necessary to complete this table. Use gross square feet for space entries in this table.

Table 5.2. PROJECT SPACE EQUATION

	A	I	II	III	IV	B
Space Utilization	Existing Space	Space to remain "as is"	Space to be Renovated	Spaces to be Demolished	New Space	Total Space upon Completion
Elem. Instructional/Resource						
Sec. Instructional/Resource						
Support Teaching						
General Support						
Supplementary						
Total School Space						

Formula-Driven Scoring: Prior AS 14.11 Funding - Question 8e

- ▶ Points are awarded if a project includes previous grant funding under AS 14.11 and the project was intentionally short funded by the legislature.
- ▶ DEED will confirm by referencing reported grant number and amount from Table 7.1, Column 1.

Previous Funding = 30 points

No Previous funding = 0 points

Formula-Driven Scoring:

Preventive Maintenance - Section 9

- ▶ Question 9b– “Labor” Reports
 - Item A: District wide report that shows total maintenance labor hours on work–orders by type of work vs. labor hours available for previous 12 months (5 pts)
 - Item B: District wide report of scheduled and completed work–orders by month for previous 12 months (5 pts)
 - Item C: District wide report of incomplete work–orders sorted by age and status for previous 12 months (5 pts)

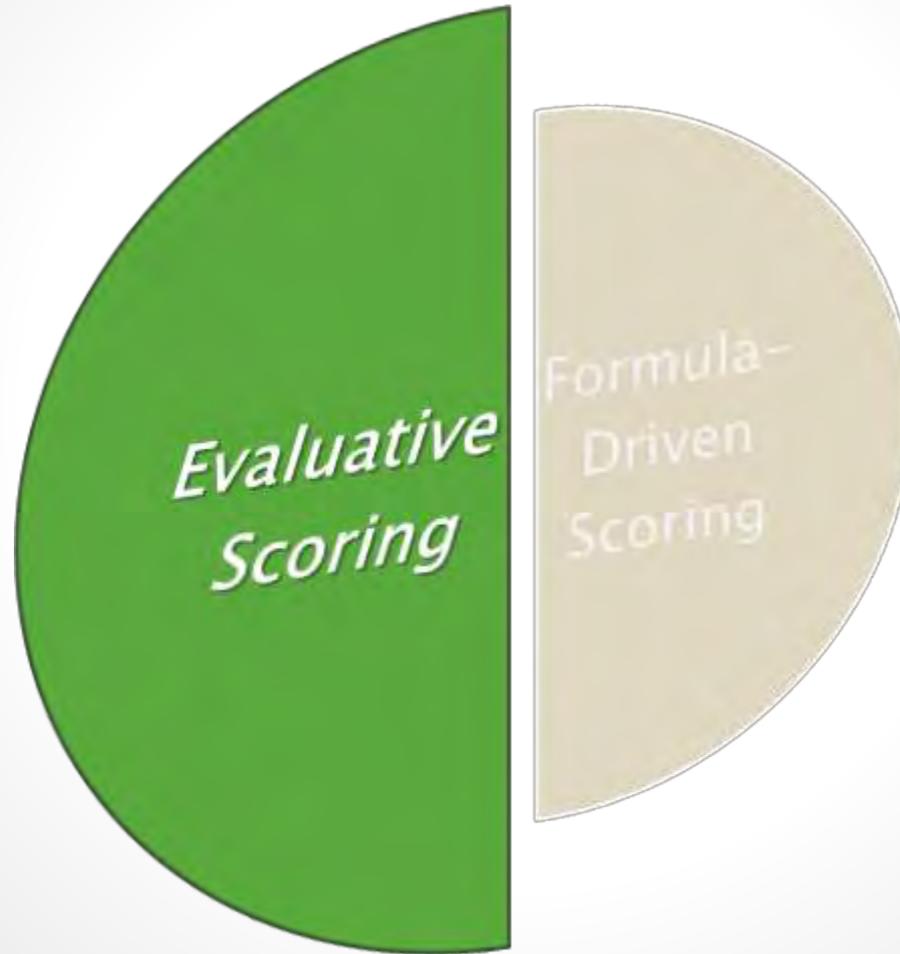
Formula-Driven Scoring: Preventive Maintenance - Section 9

- ▶ Question 9c– “Activities” Reports
 - Item A: District wide report comparing scheduled (preventive) maintenance work–order hours to unscheduled maintenance work–order hours by month for previous 12 months (5 pts)
 - Item B: District wide report of monthly trend data for unscheduled work–orders of hours and numbers of work–orders by month for the previous 12 months (5 pts)

Formula-Driven Scoring: Preventive Maintenance - Section 9

- ▶ Question 9d: Average Expenditure for Maintenance:
 - Are there sufficient resources programmed to keep the district's facilities maintained? (5 pts)
 - 5-year average maintenance expenditure
 - 5-year average replacement value
 - 4% ratio of maintenance expenditures to replacement value = 5 points

Presentation Overview



**Alaska Department of Education & Early Development
Capital Improvement Project Application
Evaluative Rating Form**
Adapted by the Bond Reimbursement and Grant Review Committee

School District: _____
 School Name: _____
 Project Title: _____
 Fund: _____ Category: _____
 Phase: _____ Maximum Points: _____
 Rater: _____ Date: _____

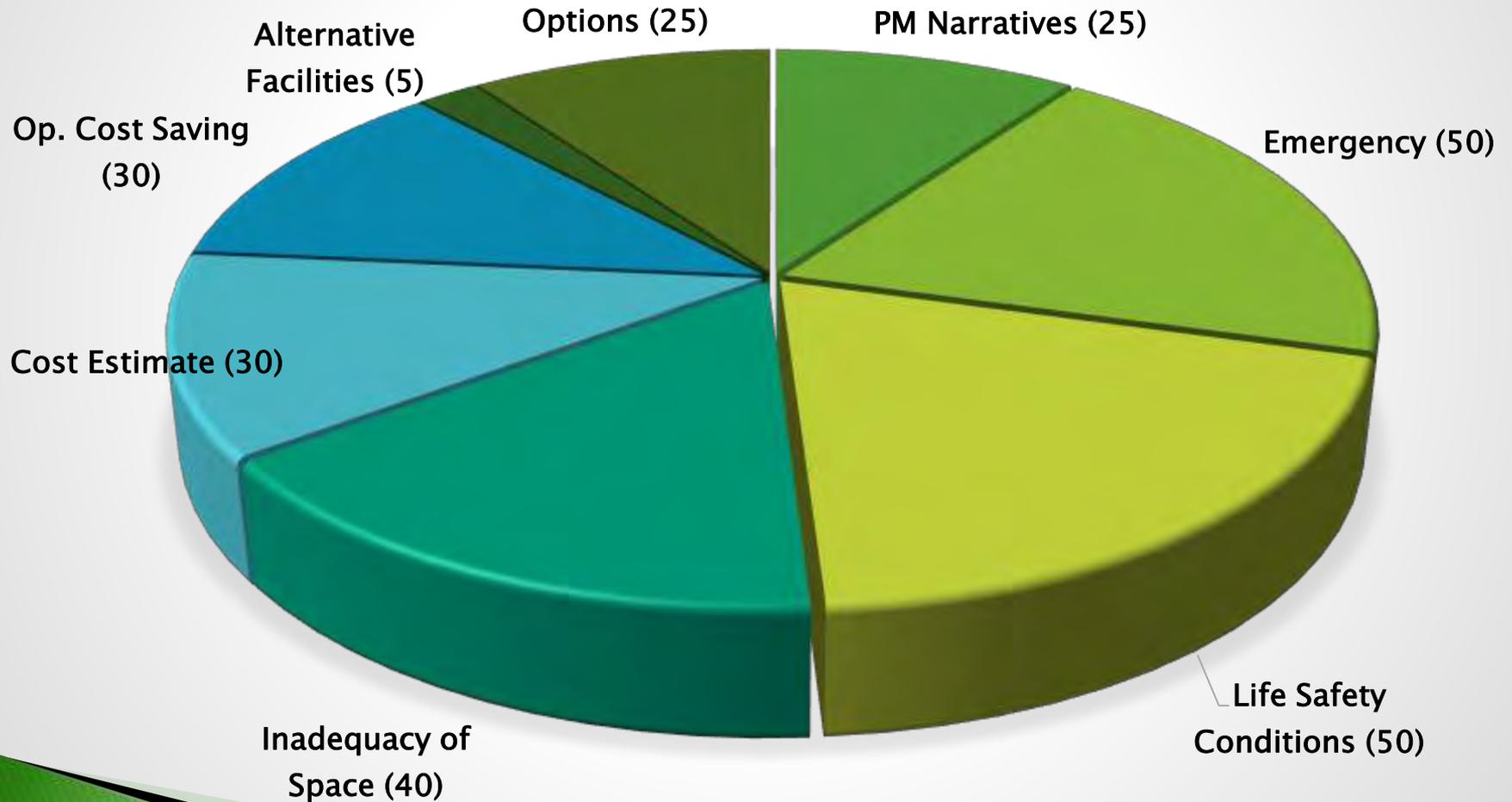
*Note: Points for elements two through eight will be weighted in apply to each specific category of a multi-
 scope project.*

Max Points		School Construction A, B, F	Major Maintenance C, D, E
25	1. Effectiveness of preventive maintenance program (Question 9) A. Maintenance Management Narrative = 5 points maximum B. Energy Management Narrative = 5 points maximum C. Overall Reliability = 5 points maximum D. Maintenance Training Narrative = 5 points maximum E. Capital Planning Narrative = 5 points maximum		
50	2. Emergency conditions (Question 8a) Did application check "yes"? <input type="checkbox"/> Did discussion support emergency status? <input type="checkbox"/>		
50	3. Seriousness of life/safety and code conditions (Question 4a)		
40	4. Existing space fails to meet or inadequately serves existing or proposed elementary or secondary programs (Question 5b) A. Mandated Program = 40 points maximum B. Existing local program = 20 points maximum C. New approved local program = 20 points maximum		
30	5. Reasonableness & completeness of cost or cost estimate (Question 7a)		
30	6. Relationship of the project cost to the annual operational cost savings (Question 5d)		
5	7. Thoroughness in considering use of alternative facilities to meet the needs of the project (Question 5g)		N/A
25	8. Thoroughness in considering a full range of options for the project (Question 5c)		
255	Total Points		

Evaluative Scoring: Overview

- ▶ 8 scoring elements, 255 possible points
- ▶ Independently scored by three raters
- ▶ Based on information submitted in the CIP application
 - Scoring will consider the full range of project submittals from conceptual to construction

Evaluative Scoring: Overview



Evaluative Scoring:

Effectiveness of the PM Program - Section 9

- ▶ Question 9a Maintenance Management Narrative (5 pts):
 - Does the described program address preventive maintenance as well as routine? If so, how?
 - Specific examples from each school
 - Does the narrative specify how the program addresses all building components: mechanical, electrical, structural, architectural, exterior/civil?

Evaluative Scoring:

Effectiveness of the PM Program - Section 9

- ▶ Question 9a (continued)– Maintenance Management Narrative (5 pts):
 - Is there evidence supplied which demonstrates that the program is effective?
 - Who participates in the program and how does it function?
 - Is the quality of the PM program reflected in the maintenance management reports?

Evaluative Scoring:

Effectiveness of the PM Program - Section 9 (cont.)

- ▶ Question 9e– Energy Management Narrative (5 pts):
 - Is the district engaged in reducing energy consumption in its facilities?
 - Is a comprehensive set of methods being used?
 - Is the program district-wide in scope?
 - Is the program achieving quantifiable results?
 - Is there a method for reviewing and monitoring energy usage? (energy data reports)

Evaluative Scoring:

Effectiveness of the PM Program - Section 9 (cont.)

- ▶ Question 9f– Custodial Narrative (5 pts):
 - Is the district’s custodial program complete? Is it district-wide in scope?
 - Is the program achieving quantifiable results?
 - Is custodial program based on quantities from building inventories and frequency of care based on industry practice?
 - Has the district customized its program to be specific to each facility?

Evaluative Scoring:

Effectiveness of the PM Program - Section 9 (cont.)

- ▶ Question 9g – Maintenance Training Narrative (5 pts):
 - Does the program address training and on-going education of the maintenance staff?
 - Are maintenance personnel being trained in specific building systems and are training schedules attached?
 - How is training recorded and effectiveness measured?

Evaluative Scoring:

Effectiveness of the PM Program - Section 9 (cont.)

- ▶ Question 9h– Capital Planning Narrative (5 pts):
 - Renewal and replacement schedules provided? Comprehensive and verifiable?
 - Does the district have a process for identifying capital renewal needs? Is it site verified?
 - Are component/subsystem replacement cycles identified and used?
 - Are systems up for renewal grouped into logical capital projects?

Evaluative Scoring:

Code Deficiency/Protection of Structure/Life Safety

- Question 4a

- ▶ 50 point maximum
- ▶ Points assignment considerations:
 - Application documents deficiency
 - Application documents need for correction
 - Application explains how the project corrects deficiency
 - Are critical and non-critical conditions combined?
 - Scoring is weighted in the case of mixed scope projects

Evaluative Scoring:

Code Deficiency/Protection of Structure/Life Safety

- Question 4a (cont.)

- ▶ Supporting documentation of the conditions is critical:
 - Condition survey
 - Photographic documentation
 - Third party communications/reports
- ▶ Documentation should be objective, specific and verifiable.

Evaluative Scoring:

Alternative Facilities - Question 5h

- ▶ 5 point maximum
- ▶ **Only scored for School Construction projects**
- ▶ Discuss alternatives considered for housing students:

Community inventory/rationale analysis/documentation	5 points
Community inventory/rationale with economic analysis	4 points
Community inventory/brief rationale provided	3 points
Community inventory/alternative facilities identified	2 points
Community inventory listed	1 point
Question not answered	0 points

Evaluative Scoring:

Cost Estimate - Question 7a

- ▶ 30 point maximum
- ▶ Scoring covers the full range of possible projects
- ▶ Scoring considers reasonableness and completeness
 - What is the source of the cost information?
 - Are lump sums described and supported?
 - Does the estimate match the scope?
 - If necessary, are additive percentages explained?

Evaluative Scoring:

Cost Estimate - Question 7a (cont.)

Project Cost - “Reasonableness Evaluation”

- ▶ Reasonable is judged by standards (DEED cost model, national estimating standards, Alaskan experience)
- ▶ The more information provided, the easier it is to evaluate “reasonableness”
- ▶ Identifying sources is important (just filling out the cost table does not provide confidence that the costs are reasonable)

Evaluative Scoring:

Cost Estimate - Question 7a (cont.)

Reasonable/matches scope/complete/construction document level	27-30 points
Reasonable/matches scope/complete/65% document level	23-26 points
Reasonable/matches scope/complete/35% document level	18-22 points
Reasonable/matches scope/complete/concept level/DEED cost model	12-17 points
Some costs not supported/a few scope items missing	6-11 points
Costs not supported/many scope items missing	1-5 points

Evaluative Scoring: Emergency - Question 8a

- ▶ 50 point maximum
- ▶ Scored only if a district declares an emergency
- ▶ Evaluation and score based on information provided in application
- ▶ Emergency must be clearly identified and described in the project description
- ▶ Scoring weighted if project includes non-emergency scope

Evaluative Scoring:

Emergency - Question 8a (cont.)

Building destroyed and must be replaced; students are currently unhoused	50 points
Building unsafe; immediate repairs required; students are currently unhoused	25–45 points
Building occupied; building official has issued an order to repair	5–25 points
A portion of the building requires significant repair or replacement in order to use for educational purposes	5–45 points
Major building component/system completely failed and requires replacement; facility is unusable until replaced	25–45 points
Major building component/system has a high probability of failure	5–25 points



Some emergencies are easy to identify, especially with proper documentation.

Evaluative Scoring:

Evaluation of Existing Space - Question 8b

- ▶ Up to 40 total points available
 - A. Mandated Programs (up to 40 points)
 - B. Existing Local Programs (up to 20 points)
 - C. New Local Programs (up to 15 points)
- ▶ Considers both physical and functional aspects
- ▶ Considers how the space meets instructional program needs
- ▶ Considers balance of program types
- ▶ Scoring is weighted for mixed scope projects

Evaluative Scoring:

Evaluation of Existing Space -

Question 8b (cont.)

Existing space significantly inadequate to meet state mandated instructional programs; severe overcrowding	25–40 points
Existing space not adequate to meet state mandated or proposed new or existing local programs; moderate overcrowding	11–24 points
Existing space not adequate to meet state mandated or proposed new or existing local programs; minor or no overcrowding	1–10 points
Existing inadequate space being addressed by major maintenance project	0–5 points

Evaluative Scoring:

Project Cost vs. Annual Cost Savings - Question 8d

- ▶ 30 point maximum
- ▶ District provides information for evaluation
- ▶ Cost/benefit perspective is important
- ▶ Credit given for numerical analysis, not opinion
- ▶ Applies to all projects
- ▶ Consider operational cost impacts of the project

Evaluative Scoring:

Project Cost vs. Annual Cost Savings -

Question 8d (cont.)

Detailed projected operational cost savings; projected savings will result in a payback of 10 years or less	21–30 points
Detailed projected operational cost savings; projected savings will result in a payback of 10 – 20 years	11–20 points
Summary analysis of projected operational cost savings; savings will result in a payback exceeding 20 years	6–10 points
Stated opinion regarding estimated cost savings	1–5 points

Evaluative Scoring:

Other Options - Question 8c

- ▶ 25 point maximum
- ▶ Different than alternative facilities
- ▶ Looking for cost analyses of options
- ▶ Options should be viable (realistic)
- ▶ Reference AS 14.11.013(b)(6)

Evaluative Scoring:

Other Options - Question 8c (cont.)

Project Options

- ▶ Describe two or more options to this project that have been considered
 - If project proposes to add new or additional space, districts must consider service area boundary changes
 - Life cycle and cost/benefit analysis are important factors
 - Discuss project execution options (phasing, in-house vs. contracted construction)

Evaluative Scoring:

Other Options - Question 8c (cont.)

Project Options

▶ **Answers are often too brief.**

Example of a school replacement project:

- Common responses to question
 - Do nothing
 - There are no other options
- Better/viable options might be:
 - Looked at double shifting, or schedule adjustments
 - Looked at providing temporary portables
 - Performed a LCCA and C/B analysis to determine most cost effective solution

Evaluative Scoring:

Other Options - Question 8c (cont.)

Fully described options supported by life-cycle/cost benefits analyses; preferred option supported by explanation and documentation; at least 3 options, including proposed project	21–25 points
Fully described options without life-cycle/cost benefits analyses; preferred option supported by explanation and documentation; at least 3 options, including proposed project	11–20 points
A description of each option; no additional documentation or cost analysis; at least 2 options, including proposed project	1–10 points

Scoring Issues

▶ Evaluative scoring

- Update preventive maintenance narratives; dated information doesn't provide confidence that program is effective.
- Discuss data in maintenance reports—what do the numbers say about the district's maintenance management program? Explain the numbers (i.e. why are there so many unreported maintenance hours?)
- Facts and figures score better than unsupported narrative.

Scoring Issues

- ▶ Formula–Driven scoring
 - Primary purpose (question 1b) should be the same on the application and the six–year plan
 - Rank of project (question 3a) should be the same on the application and the six–year plan
 - Facility information should correspond to info in DEED’s facility database (i.e. facility #, GSF, year built)

Application Issues

- ▶ **Instructions / Appendices / Rater's Guide:**
 - **Read through the instructions, appendices, and rater's guide before filling out the application**
 - They are important for a complete understanding of the process
 - They provide both instruction and direction
 - Definitions in the appendices A (category of project), C (project budget categories) and E (maintenance components) are good resources

Application Reminders

- ▶ Indicate when projects are complete and being submitted for reimbursement.
- ▶ Project scope – provide a full explanation of the project (work requested in the application).
- ▶ Be consistent – make sure all of the pieces of the application address the same scope of work.
- ▶ Use of photographs and drawings and quantitative measurements are very helpful.

Application Suggestion

- ▶ Before submitting, have someone who is not familiar with the project read your application:
 - Does the project description make sense? Is the application reasonable and complete?
 - Are all of the items required for eligibility included?
 - Are the applications and attachments organized and clearly labeled?
 - Is it signed by the Superintendent or Chief School Administrator?

Thank you for attending the workshop!

Feel free to contact the facilities section if you have further questions; we are here to assist you.

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