



**REACH FOR THE SKY:
PROJECT PLANNING, APPROVAL
AND FUNDING**

Planning / Approval / Funding

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OHIO SCHOOL FACILITIES COMMISSION

MASTER PLANNING ACTIVITIES

The Planning, Approval, and Funding portion of the OSFC process includes data-gathering activities (developing enrollment projections and assessing existing facilities), incorporating the data into a Master Facilities Plan, site selection, approvals of the Master Facilities Plan, and securing funding for the district's building program.

FACILITY ASSESSMENT

The development of a uniform and comprehensive assessment of a district's facilities is central to CFAP, VFAP, ENP, ELPP and VFAP ELPP. The process has evolved since 1997 and is accomplished through assessing consultants working with a sophisticated Internet-based Assessment Tool. The school district will be requested to provide floor plans and other information and to make Facilities Managers available to assist the consultants in the evaluation of the facilities.

The Facility Assessment report contains a variety of data about each of the district's buildings, such as: site acreage, current grade configuration, capacity, number of floors, number of teaching stations (classrooms, labs, etc.), total building square footage, and the dates of construction for the original building and additions. However, it is important for all parties to understand that the use of the Facility Assessment report is for the purpose of developing an estimated project cost and scope based on best available data. Conditions which are hidden or otherwise unknown may have an impact on the final project cost.

ROLE OF THE PLANNER

OVERALL ROLE

1. Acts as first point of contact for the district when working with the Commission.
2. Assists the district in connecting the educational program with the facility needs of the district.
3. Meets with district representatives to communicate Commission policies and procedures.
4. Provides support to the district and demonstrates options available.
5. Serves as facilitator in communicating district needs and desires to Commission staff.

ROLE IN PRE-PLANNING PHASE OF THE PROJECT

1. Attends community meetings if necessary to inform the district's constituencies about Commission policies, answer questions, and explore options.
2. Provides information to district on selecting a Design Professional.
3. Communicates site evaluation criteria to district as they seek a proper "buildable" site.

ROLE IN PLANNING, APPROVAL & FUNDING PHASE OF THE PROJECT

1. Reviews facility assessment and helps the district to plan for renovation or new construction.
2. Calculates state and local share of the project costs.
3. Works with Educational Planner, Assessment Consultant and Regional Program Consultant (RPC) to establish for the Master Facility Plan (MFP).
4. Applies Commission planning parameters and policies to Master Facility Plan (renovation versus new build, 350 student guideline, etc.).
5. Facilitates transfer of project to Project Administrator.

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

CHAPTER 1: INTRODUCTION

A. ROLES OF PARTICIPANTS IN PLANNING, DESIGN, AND CONSTRUCTION

The Project Team is responsible for creating and implementing a district facility plan. The planning, contracting, and project management strategies involved in this process have been developed, refined, and have proven to be successful in millions of dollars worth of school projects. Each team member will need to access various portions of the Design Manual to better understand his/her role and fulfill his/her responsibilities.

1. Participants in Creating the Master Facility Plan

Role: Assessment Consultant

Responsibilities: The Assessment Consultant assesses the condition of buildings, evaluates the overall building needs of the district, estimates costs and assists in developing the Master Facilities Plan.

Role: Educational Planner

Responsibilities: The Educational Planner develops and reports the most likely projected enrollment for the next ten years for assigned school districts. The following data is considered in developing the enrollment projections: historical enrollment of the school district, including special education enrollment; previously completed enrollment projections; grade level survival or transfer patterns and open enrollment numbers; federal and school district census data to include population, household, and economic information; live birth data for the district, county and municipalities; real estate transaction information; housing development patterns and building permits for single-family and multi-family units, including historical permits for the last ten years and projected permits for the next ten years; names and enrollments of private/parochial schools in the school district; and maps of the district. Career-Technical enrollment will be determined based on Commission guidelines.

Role: Regional Program Consultant (RPC)

Responsibilities: The Regional Program Consultant coordinates, manages, monitors, and plans the resources and schedule for the facilities assessment, student enrollment study, and Master Facilities Plan for assigned school districts. For the projects included in the Expedited Local Partnership Program (ELPP or VFAP ELPP), the RPC reviews plans and specifications for Design Manual compliance, reviews budget estimates prepared by the Design Professional (DP) and/or Construction Manager (CM), and provides various services during the construction phase.

2. Participants in Creating and Implementing the Master Facility Plan

Role: School District Representative

Responsibilities: Depending on the size of the district and the complexity of the projects, the school district representatives may include the Superintendent, a Principal, and/or the district's Facility Director. The school district representative is responsible for representing and making decisions on behalf of the school district in planning, design, and construction throughout the process.

Role: OSFC Staff

Responsibilities: Various OSFC staff members provide comprehensive support for the Project Team. A Planner is responsible for using the facility assessment information and enrollment study information to develop the Master Facility Plan for a district. Additional staff members with varying expertise participate as needed and serve as information resources throughout the project.

3. Participants in *Implementing* the Master Facility Plan

Role: The Design Professional (DP)

Responsibilities: The DP is involved in developing the Program of Requirements for the project. The DP, along with his or her consultants, is responsible for the documents that are developed during design and that are ultimately used for the construction of the project.

Role: The Construction Manager (CM)

Responsibilities: The CM is responsible for scheduling, estimating, and providing overall coordination for projects.

Role: OSFC Project Administrator (PA)

Responsibilities: A Project Administrator is the primary interface for the school district, the CM, and the DP. The PA accommodates the unique needs of the school district within the framework of Commission policies and procedures.

Role: Maintenance Plan Advisor (MPA)

Responsibilities: The MPA is hired by the district to provide a detailed plan to service, maintain, and prolong the life of the facilities using the maintenance fund.

Role: Commissioning Agent

Responsibilities: The Commissioning Agent is hired by the district to provide a single point responsibility to ensure efficiency of operation and performance of the building's major systems.

Every team member must understand and fulfill his or her responsibilities for the planning, design, and construction process to be successful. Fortunately, the team works together to be sure that everyone's voice is heard and decisions are made and implemented in a timely manner. Partnering sessions are held throughout the process to help all the stakeholders work together in an environment of mutual trust with open channels of communication.

Assessment Consultant General Scope Guidelines

INTRODUCTION

Assessing consultants will be assigned by the OSFC to be part of a regional team. The “Team” consists of a team leader – *the Regional Program Consultant (RPC)*, one or more *Assessment Consultants (AC)*, and one *Educational Planner (EP)*. The team will be responsible for assisting the OSFC with the assessment of existing school facilities and the development of a new master facilities plan for school districts located within the team’s geographical region. OSFC will make assignments to RPC’s and educational planners as necessary to accomplish program requirements. Subsequently, the RPC’s will make assignments to assessment consultants. Periodically, the OSFC may request the AC to perform assessment work for facilities not located within their assigned geographical region.

Prior to AC involvement, the RPC will forward a copy of the “*District Questionnaire*” to the school district for completion and return. The District Questionnaire provides basic information regarding the district’s historical enrollment data and the district’s existing school facilities. The AC will coordinate with the RPC the receipt and transfer of the District Questionnaire information. As a standard practice, the District Questionnaire should be received prior to on-site data collection.

FACILITIES ASSESSMENTS

Upon accepting an assignment, assessing consultants will work with the RPC to schedule the assessment activity (i.e. date of initial district contact, date(s) of on-site data collection, date of initial report submittal, date of final report submittal, etc.) in order to produce the “*Project Schedule*.” The assessment consultant will also coordinate with the RPC regarding contact with district representatives.

Simultaneously, the OSFC will assign an Educational Planner to begin developing enrollment projections. When required, the AC will coordinate, through the RPC, information sharing with the educational planner, and ultimately the AC will coordinate with the EP and the RPC for inclusion of enrollment projection data into the final assessment report.

❖ On-site Data Collection

Pursuant to the schedule developed with the RPC, the AC will meet on-site with the school district. As a standard practice, consultants should endeavor to include the superintendent, treasurer, business manager, and facilities manager/maintenance supervisor in this meeting. The purpose of the meeting should be to familiarize the district with the procedure for building evaluation and data collection as well as to garner input from district representatives regarding special concerns/interests of the district. The following list outlines some of the information that should be retrieved from district personnel.

- Special concerns about the physical condition of any of the existing facilities
- Special knowledge regarding the physical condition of any of the existing facilities
- Hazardous material abatement management plans
- Unusual ownership arrangements pertaining to any existing facilities
- Special desires for retaining any existing facilities
- Historically significant facilities
- Special interests regarding future master facilities planning already developed by the district

It is imperative that the AC be mindful of their responsibility to simply collect data from the school district, and to not engage in drawing conclusions regarding the master plan outcome for a specific building.

In order to standardize assessments across the state, OSFC has produced the “*Assessment Cost Guidelines*”, which outline the structure, format, and cost estimating for facility assessments. Each assessment will evaluate the condition of 23 different building systems and components, pursuant to the Assessment Cost Guidelines, and determine a scope and budget to repair to the standards set by OSFC. Additionally, each assessment will require assessors to evaluate the “condition of educational adequacy” pursuant to questions in six different categories contained in the “*CEFPI – School Facilities Appraisal*”.

On-site data collection shall be executed efficiently but thoroughly. The condition of every space (occupied or un-occupied), roof, system, component, etc., shall be observed and evaluated, to the extent allowable without destructive or invasive testing. As a standard practice, to the greatest extent practicable, AC’s should use pre-prepared data collection forms that require only “fill-in-the-blank” while on-site. However, it is also important for assessors to make “field notes” of noteworthy conditions that are not covered by standardized forms.

Some of the information required for each assessment that may not be covered in standardized forms is outlined as follows.

- School district map showing the location of each school
- Single-line site drawing, for each separate building, showing the site boundaries and relative location of building(s) and adjacent streets
- Accurate determination of gross building area calculated pursuant to the following criteria:
 - Stairs, ramps, and elevators shall be included in the Corridor area calculation
 - Stair area shall be calculated as 100% on the ground floor and 50% on elevated floors; area shall be calculated based on the total area inside the stair enclosure walls
 - Elevators shall be calculated as 100% on the ground floor and 0% on elevated floors
 - Do not count overhangs as area

- Area of each interior space within the building, including designations for any space deemed to be “un-usable” pursuant to the “*Excess Square Footage in Renovated Facilities and Locally Funded Initiative*” Policy & Procedure Memorandum
- Typical room illumination levels (in footcandles)
-
- CADD building floor plan (each floor) with color shading to designate each separate building addition (any space determined to be un-usable shall be identified as a separate building addition)
- CADD building floor plan (each floor) with each room labeled, with name and area, with color shading to designate areas calculated for oversized space, pursuant to the attached “*Excess Square Footage in Renovated Facilities and Locally Funded Initiative*” Policy & Procedure Memorandum
- Digital photographs, in addition to those required in standardized reports, thoroughly documenting a general understanding of the building as well as conditions of special note (provide on CD)
- Readily evident conditions that might significantly effect master planning with regard to the site (i.e. site topography (i.e. flood plain, site slope, preserves, wetlands, easements, etc.), on-site obstructions (i.e. buildings, vegetation, utilities, etc.), adjacent land uses, sensory distractions (i.e. airport landing pattern, sewage treatment facilities, etc.), etc.)
- Readily evident conditions that might significantly effect master planning with regard to the building (i.e. is there enough room above ceilings to replace/add new HVAC system, are there reasonable solutions to accessibility, anything that would make an A-W recommendation difficult or unreasonable to implement, etc).

All assessment consultants will wear identification tags while on site at school districts. Assessor’s scheduled path of progress will be discussed with and approved by the school district prior to beginning.

❖ **Standardized Reporting**

The OSFC has developed a web-based reporting tool, into which, the data collected on site will be entered. Each consultant will be required to produce assessment reports in this fashion. This will require access to the world-wide-web via a high-speed data connection (T-1, DSL, xDSL, dual ISDN (128kb), cable modem, etc.). Due to the nature of the technology, periodic “slow spells” may be encountered as a result of heavy web usage; likewise, periodic downtime may be encountered due to OSFC hardware/software modifications. Please note that OSFC hardware is “pc-based” and some software that may commonly be used in pursuit of this work is Microsoft Word, Excel, and Access.

Each consultant will endeavor to work with the RPC and other team members to ensure a “standard” for data entered into the web tool for the purposes of a standardized report style.

The web tool contains a feature that allows individual building reports to be printed in PDF form. Each AC will be responsible for providing, to the RPC, one web tool print for each building at the time of initial completion of the report. The preliminary report will be

reviewed and returned, as necessary for corrections, until the report is ready for presentation to the school district. The team is responsible for ensuring that the report is ready for presentation to the district pursuant to the project schedule.

OSFC has developed a standardized final report format for all assessments. Each assessment report will be contained in 2” white, three-ring binders. Standardized format for cover and spine will be made available. Each report will contain the following pre-printed white tabs and associated material.

- Introduction
 - Pre-formatted introduction
- District Questionnaire
 - Completed questionnaire as returned by the district
- Enrollment Projections
 - Enrollment Projections Report
- Assessment Summary
 - District Summary and Map
 - Individual Building Summaries

- Building Assessments (one tab with each building name)
 - Assessment report as printed from the web tool
 - One-line floor plans
 - CEFPI appraisal as printed from the web tool
- District Documentation
 - Ancillary materials provided by district
- Meeting Minutes

❖ **Assessment Presentation**

In preparation for presentation of the assessment findings, pursuant to the project schedule, each AC will be responsible for producing assessment reports, in quantities as determined by the Personal Services Agreement, for presentation to the school district. The AC may be asked to attend the assessment presentation meeting with the school district. Additionally, the consultant’s representative may be asked to present the assessment findings to those assembled for that meeting. It is important to the OSFC that those making such presentations be adept at delivering well-organized, concise, clear thoughts.

Once the school district has had 30 days to review and comment on the assessment findings, and the consultant has responded to any required changes, the assessment work can be considered completed for the purposes of final invoicing. The OSFC expects that consultants will maintain a professional attitude as it relates to responding to extenuating circumstances that may arise from time to time.

❖ **Additional Services**

Periodically the AC may be requested to provide services in addition to the standard assessment services described above. Those services may include the following.

- Special on-site data collection over and above that required for the standard comprehensive assessment
- Quality control assessment services
- Master planning services
- Design document review services
- Other similar services

Compensation for additional services will be as specified in the Personal Services Agreement.

MASTER PLANNING SUPPORT

Generally, the OSFC and the RPC will facilitate the master planning process with the school district. However, from time to time the AC will be asked to assist with this process, and will be compensated as stipulated in the executed Personal Services Agreement. In such cases, the OSFC will expect the AC to assign the “right person for the job” (i.e. clerical, on-site crew member, architectural planning, etc.).

The following list summarizes some of the services the AC may be asked to provide.

- Generate web tool options
- Provide architectural planning expertise
- Attend planning meetings with districts
- Prepare architectural drawings
- Prepare final master plan reports
- Other similar planning services

OPERATIONAL POLICY

As previously stated, the AC will be part of a regional team as assigned by the OSFC. It should be noted that the Personal Services Agreement contains a “Conflict of Interest” clause. This clause precludes a consultant (or a consultant’s consultants, i.e. engineers) from providing A/E services to a school district for a project on which that AC provided assessment/master planning services unless granted a waiver by the OSFC. Generally, the OSFC will endeavor to assign a consultant outside of the consultant’s primary market, if so desired by the consultant. However, as stated in the agreement, the consultant has the right to decline an assignment.

The right to decline notwithstanding, the OSFC expects the consultant to pursue the scope of work associated with the agreement in good faith and accept and perform their share of the work. While there is no guarantee of any amount of work, the goal will be to distribute the assignments relatively evenly.

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

CHAPTER 1: INTRODUCTION

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

Example of Building Assessment Summary

PLANNING, APPROVAL & FUNDING

The Summary includes inventory details about all the buildings that were assessed.

District:		County:		Area:		
Name:		Contact:				
Address:		Phone:				
Bldg. IRN:		Date Prepared:				
		Date Revised:				
Current Grades	9-12	Acreage:	12	CEFPI Appraisal Summary		
Proposed Grades	N/A	Teaching Stations:	31			
Current Enrollment	395	Classrooms:				
Projected Enrollment	N/A					
				Section	Points Possible	
					Points Earned	
					Percentage	
					Rating Category	
Cover Sheet						
1.0 The School Site				100	44	44%
2.0 Structural and Mechanical Features				200	109	55%
3.0 Plant Maintainability				100	51	51%
4.0 Building Safety and Security				200	97	49%
5.0 Educational Adequacy				200	82	41%
6.0 Environment for Education				200	88	44%
Commentary						
Total				1000	471	47%
C=Under Contract						
Handicapped Access						
Satisfactory						
Roads Repair						
Replacement						
Renovation Cost Factor						96.73%
Cost to Renovate (Cost Factor applied)						\$4,293,230.86
The Replacement Cost Per SF and the Renovate/Ratio are only provided when this summary is requested from a Master Plan.						

The Facility Assessment Summary indicates the rating of each of the 23 building systems.

	FACILITY ASSESSMENT	Rating	Dollar Assessment
[IMAGE] A.	Heating System	1	\$0.00
[IMAGE] B.	Roofing	3	\$148,280.00
[IMAGE] C.	Ventilation / Air Conditioning	3	\$730,780.00
[IMAGE] D.	Electrical Systems	3	\$529,335.00
[IMAGE] E.	Plumbing and Fixtures	3	\$23,500.00
[IMAGE] F.	Windows	3	\$259,450.00
[IMAGE] G.	Structure: Foundation	1	\$0.00
[IMAGE] H.	Structure: Walls and Chimneys	2	\$2,000.00
[IMAGE] I.	Structure: Floors and Roofs	1	\$0.00
[IMAGE] J.	General Finishes	2	\$623,439.00
[IMAGE] K.	Interior Lighting	2	\$88,222.50
[IMAGE] L.	Security Systems	3	\$117,830.00
[IMAGE] M.	Emergency/Egress Lighting	3	\$29,407.50
[IMAGE] N.	Fire Alarm	2	\$73,518.75
[IMAGE] O.	Handicapped Access	3	\$44,890.75
[IMAGE] P.	Site Condition	1	\$0.00
[IMAGE] Q.	Sewage System	1	\$0.00
[IMAGE] R.	Water Supply	1	\$0.00
[IMAGE] S.	Exterior Doors	1	\$0.00
[IMAGE] T.	Hazardous Material	3	\$62,691.00
[IMAGE] U.	Life Safety	3	\$366,148.75
[IMAGE] V.	Loose Furnishings	3	\$235,260.00
[IMAGE] W.	Technology	2	\$165,858.30
[IMAGE] X.	Construction Contingency / Non-Construction Cost	-	\$848,044.71
Total			\$4,348,456.26

Ratings:
1=Satisfactory
2=Needs Repair
3=Needs Replacement

The CEFPI Appraisal is an instrument that yields information about the ability of the building to support the educational program.

Each item on the summary is linked to a detailed description of the assessor's findings and recommendations

B. Roofing

Description: The existing roof membrane system was installed in 1989 and 1990. There were no significant problems observed with the roofs on any of the buildings. However, all roofs are at least 10 years old.

Rating: 3 Needs Replacement

Recommendations: Replace membrane roofs.

Item	Cost	Unit	Whole Building	Mechanicsburg High School (1934)	Mechanicsburg High School (1950)	Mechanicsburg High School (1957)	Mechanicsburg High School (1976)	Sum	
Other: Membranes	\$148,280.00	ump sum		7,425 ft ²	26,460 ft ²	11,160 ft ²	13,770 ft ²	\$148,280.00	replace membrane roofs \$5.00 x 29656 SF
Sum:			\$148,280.00	\$148,280.00	\$0.00	\$0.00	\$0.00		

ASSESSMENT COST GUIDELINES – 2007

A. HEATING SYSTEM

The Assessment Consultant shall evaluate the HVAC system and determine the requirements for each building or building addition using the funding chart below.

HVAC System Replacement:	\$ 22.00 sf	(includes demo of existing system and reconfiguration of piping layout and new controls, air conditioning and duct work)
Convert To Ducted System	\$ 7.00 sf	(includes costs for vert. & horz. chases, cut openings, soffits, etc.)
Heating System (Only):	\$ 8.00 sf	(for boilers, pump & piping replacement, not AHU)
Controls (Only):	\$ 2.50 sf	

Heating System Component replacement:

(describe “Components” along with opinion of probable costs within recommendation section)

Additional Comments:

- Systems which are not compliant with the OSDM are acceptable, providing they can meet OBBC fresh air requirements and are in safe/good working order. They should have a long-term additional life expectancy.
- Radiators must be removed.
- Rooftop units that are over 10 years old are to be replaced.
- If the controls are older than 1975, or not DDC, replace them.
- Heating system cost includes demolition of the existing system and reconfiguration of piping layout.
- Use “convert to ducted system” when changing from a non-ducted system. Do not repeat in Item “C”. Use only in conjunction with “HVAC System Replacement”.

Coordination Comments:

- If total HVAC system replacement is required, Item “C” shall be zero.
- If HVAC system is being replaced, replace acoustic ceilings under item J. GENERAL FINISHES and lighting under Item K. INTERIOR LIGHTING.
- If upgrading/adapting the heating system to accommodate cooling, use Item “C” Ventilation/AC.
- If replacing mechanical system add electrical service and connections under “D”.
- If replacing unit ventilator system verify whether adjacent casework needs to be replaced under “J. GENERAL FINISHES”.

HIGH BAY/INDUSTRIAL SPACE – LAB TYPES 5, 6, 7:

Heating and Ventilation System:	\$ 16.00 sf	(includes demo of existing system and reconfiguration of piping layout and new controls)
Roof Top Unit	\$ 11 sf without air conditioning	
	\$ 13 sf with air conditioning	

B. ROOFING

The Assessment Consultant shall document the age of existing roof(s) and note any known problems. Look for stained ceilings on the inside of each building as an indication of potential roof problems.

Asphalt Shingle:	\$	2.85 sf	
Asphalt Shingle with Ventilated Nail Base:	\$	6.25 sf	
Deck Replacement:	\$	3.50 sf	(wood or metal, including insulation)
Built-up Asphalt:	\$	7.00 sf	
Built-up Coal Tar:	\$	12.50 sf	
Membrane (all types):	\$	7.00 sf	(unless under 10,000 sf)
Standing Metal Seam:	\$	13.00 sf	
Repair/replace cap flashing & coping:	\$	17.50 lf	
Gutters/Downspouts:	\$	11.50 lf	
<u>Hazardous Material Replacement Costs:</u>			
Roofing Replacement	\$	8.00 sf	

Other:
(describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- Costs listed above include tear off of existing roof (non-asbestos containing shingles and/or underlayment). The systems include flashings.
- Replace membrane roofs that are (7) years old or older.
- Replace built-up roofs that are (15) years old or older.
- Replace asphalt shingle roofs that are (10) years old or older.
- Foam Roofing systems are to be budgeted for replacement. Use Membrane roof replacement at \$7.00/sf.
- Replace tile roofs with asphalt shingles; add deck if necessary.

Coordination Comments:

- Use only one roof system type to replace multiple systems used on a single facility, except for pitched roofs. The replacement roof should be in-kind to the most dominant roofing type being replaced.

C. VENTILATION/AIR CONDITIONING

The Assessment Consultant shall verify that all buildings or additions to buildings have air conditioning.

Air Conditioning System:	\$	16.10 sf	
Dust Collection System:	\$	25,000.00 per system	(complete w/installation)

Other:
(describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- Add air to a school that has an acceptable heating system; this may require adapting the heating system to accommodate cooling.
- All shop areas are required to have dust collection systems in addition to HVAC upgrades.
- To completely replace heating and air conditioning systems, see Item "A" above.
- Window units are not acceptable.

Coordination Comments:

- If the building contains Air Conditioning and partial Air Conditioning component replacement exceeds \$ 10.78 per sf then replace entire Air Conditioning System at \$ 16.10 per sf
- If replacing Air Conditioning, replace acoustic ceilings under Item J. GENERAL FINISHES and lighting under Item K. INTERIOR LIGHTING.

HIGH BAY/INDUSTRIAL SPACE – LAB TYPES 5, 6, 7:

Welding Exhaust System:	\$ 50,000.00 per system
Paint Booth Exhaust System:	\$ 12,000.00 per system
Vehicle Emission System:	\$ 15,000.00 per system
Paint Hood System:	\$ 7,500.00 per system
Exhaust for Gas-fired Equipment:	\$ 3,500.00 per system

Other (describe “Other” items along with opinion of probable costs within recommendation section)

Additional Comments:

- To completely replace heating and ventilation systems, see Item “A” above.
- Dust Collection System to be installed in Carpentry and **Wood Product Technologies** labs.
- Welding Exhaust System to be installed in Agriculture Production, Building & Property Maintenance, Industrial Maintenance, Marine Maintenance, Natural Resources, Power Equipment Technology, Welding & Cutting, **Engineering Technologies**, Manufacturing Engineering Technology and Agriculture Industrial Equipment labs.
- Paint Booth Exhaust System to be installed in Aircraft Maintenance, Agriculture Production and Auto Collision Repair labs.
- Vehicle Emission System to be installed in Auto Specialization, Marine Maintenance, Auto Technology and Medium/Heavy Truck Technician labs.
- Paint Hood System to be installed in Marine Maintenance lab.
- Exhaust for Gas-fired Equipment to be installed in Plumbing and Pipefitting lab.

D. ELECTRICAL SYSTEMS

The Assessment Consultant shall verify that the electrical is adequate for estimated electrical loads (refer to Minimum Amperage Chart below).

System Replacement:	\$ 15.75 sf	(Includes demo of existing system. Includes generator for life safety systems. Does not include telephone or data cable or equipment)
Building System removal-Demo	\$ 3.00 sf	
Building Power Replacement	\$ 7.00 sf	
Building Power Removal-Demo	\$ 1.00 sf	
<u>Components:</u>		
Panel Replacement:	\$ 3,500.00 unit	(power or lighting sub-panel only)
Transformer Removal:	\$ 1,500.00 lump sum	(per phase/can)
New Pad Mounted Transformer:	\$ 15,000.00 lump sum	(1000 KVA – includes demo of existing system)
Step-down Transformer:	\$ 1,500.00 lump sum	
Additional Circuits:	\$ 800.00 per circuit	
Additional Receptacles:	\$ 250.00 each	
Lightning Protection:	\$ 0.30 sf	
Grounding:	\$ 0.25 sf	

Other:
(describe “Other” items along with opinion of probable costs within recommendation section)

Minimum Amperage Chart		
Building Square Footage	Minimum Amperage 480v 3 phase	Minimum Amperage 208v
0-10,000	400	1,000
10,000 – 20,000	400	1,000
20,000 – 30,000	600	1,200
30,000 – 40,000	800	1,600
40,000 – 50,000	1,000	2,000
50,000 – 60,000	1,200	2,400
60,000 – 70,000	1,400	3,000
70,000 – 80,000	1,600	3,500
80,000 – 90,000	1,800	
90,000 – 100,000	2,000	

For each 10,000 sf increment over 100,000 sf increase 480-volt service size by 200.

Additional Comments:

- If electrical system is over 35 years old, replace entire system.
- If black oil-filled transformers are PCB contaminated, they must be replaced.
- New pad mounted transformer cost includes demolition of existing transformer.
- Replace single-phase service with three-phase service, if available.

Coordination Comments:

- If Electrical Component replacement exceeds \$ 10.55 per sf then replace entire Electrical System at \$ 15.75 per sf
- Individual components costs should not be applied when a full system replacement has been indicated.

HIGH BAY/INDUSTRIAL SPACE – LAB TYPES 5, 6, 7:

Bus Duct:	\$ 150.00 per lf	
208v 3 Phase Service	\$ 15,000 lump sum	(Includes 300 lin. ft. conduit. Does not include new transformer, upgraded panels or switch gear.)
480v 3 Phase Service	\$ 20,000 lump sum	(Includes 300 lin. ft. conduit. Does not include new transformer, upgraded panels or switch gear.)

Additional Comments:

- Bus Duct to be installed in Electrical Trades Lab.
- 208v 3 phase and 480v 3 phase electrical service to be installed in Electrical Trades, Industrial Maintenance, Manufacturing Operations, Plastics, Welding & Cutting, Manufacturing Engineering Technology, Precision Machinery and Tool & Die Making.

E. PLUMBING AND FIXTURES

The Assessment Consultant shall determine if there are pressure problems and number of systems if additions are present, and address all other concerns using the cost indicated below. Do not put any cost of handicapped compliance in this area.
– The Assessment Consultant shall determine if there are sufficient numbers of plumbing fixtures based upon plumbing code in effect at time of assessment. Determine fixture count by dividing the square footage of the building by the allowable square footage per student in the Design Manual.

Back Flow Preventer:	\$ 5,000.00 unit	
Water Treatment System:	\$ 15,000.00 unit	(Domestic Water System, softening only, per system)
Water Treatment System:	5,500.00 unit	(Chlorination type, per unit)
Domestic Supply Piping:	\$ 3.50 sf	(remove/replace)
Sanitary Waste Piping:	\$ 3.50 sf	(remove/replace)
Domestic Water Heater	\$ 5,100.00 unit	(remove/replace)
Toilet:	\$ 3,800.00 unit	(new)
Toilet:	\$ 1,500.00 unit	(remove/replace) See Item O
Urinal:	\$ 3,800.00 unit	(new)
Urinal:	\$ 1,500.00 unit	(remove/replace)
Sink:	\$ 2,500.00 unit	(new)
Sink:	\$ 1,500.00 unit	(remove/replace)
Electric Water Cooler:	\$ 3,000.00 unit	(double ADA)
Replace Faucets and Flush Valves	\$ 500.00 unit	(average cost to remove replace)
Two Station Modular Lavatory	\$ 3000.00 unit	(remove/replace)
Three Station Modular Lavatory	\$ 4000.00 unit	(remove/replace)

Other:

(describe “Other” items along with opinion of probable costs within recommendation section)

Additional Comments:

- Some schools with additions have more than one service.
- If domestic supply piping is galvanized pipe, replace the distribution system.
- Current codes require back-flow preventors, if there are none, add to system.
- Floor mounted toilet fixtures are acceptable if in safe/good working order and have a long-term additional life expectancy.

HIGH BAY/INDUSTRIAL SPACE – LAB TYPES 5, 6, 7:

Safety Shower/Eyewash:	
Remove & Replace Existing:	\$ 450.00 each
New Installation:	\$ 2,500.00 each
Utility Sink:	\$ 2,400.00 unit
Hose Bibbs:	\$ 800.00 unit
Wash Fountain:	\$ 3,600.00 unit
Natural Gas Connections:	\$ 800.00 each
Compressed Air Connections:	\$ 15,000.00 system
Grease Trap or Oil Interceptor	\$ 6,000.00 each

Additional Comments:

- All high bay labs will have safety shower/eyewash, utility sink, hose bibbs and wash fountains.
- Natural Gas Connections to be included in Building and Property Maintenance, Heating and Ventilation Technician and Plumbing & Pipefitting labs.
- Compressed Air Connections to be included in Appliance Repair, Agriculture Production, Auto Specialization, Business Machine Maintenance, Heavy Equipment Operations, Industrial Maintenance, Manufacturing Operations, Masonry, Natural Resources, Plastics, Plumbing & Pipefitting, Power Transmission, Welding & Cutting, **Engineering Technologies**, Manufacturing, Engineering Technology, Agriculture Industrial Equipment, Auto Collision Repair, Auto Technology, Carpentry, Medium/Heavy Truck Technology, **Wood Product Technologies**, Precision Machining, Tool & Die and Aircraft Maintenance labs.

F. WINDOWS

The Assessment Consultant should visually determine the area of windows to be replaced, by establishing an estimate based on approximate area of windows times number of units. The **Ohio School Facilities, Ohio School Design Manual** supports integral blinds.

Insulated Glass/Panels:	\$	55.00 sf	(includes blinds)
Skylights:	\$	125.00 sf	(remove and replace)
Translucent Panels:	\$	125.00 sf	(remove and replace)
Curtain Wall/Storefront System:	\$	60.00 sf	(remove and replace)
Greenhouse Replacement	\$	\$85.00 sf	(demo and replace)
<u>Hazardous Material Replacement Costs:</u>			
Door and Window Panel			
Replacement:	\$	200.00 ea	

Other:

(describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- All single pane glass windows are to be replaced.
- All non-thermally broken window units are to be replaced.
- The above cost includes demolition of existing windows and installation of new panel screens and replacement windows.
- Replace glass block, which is part of an integral window system, only if the windows are being replaced, or if the glass block is in disrepair; replace glass block with windows. All other glass block, which is in good condition, may remain.
- Exterior transom windows and sidelights to be included in window area.

G. STRUCTURE

The Assessment Consultant shall look for cracking and differential movement of the building and any additions. In addition, check any existing crawl space(s) for deterioration of structure. Determine if the district has experienced any structural problems. **Do not go down in pipe tunnels.**

Waterproofing:			
Spray Applied:	\$	4.00 sf	(includes excavation and backfill)
Membrane:	\$	5.00 sf	(includes excavation and backfill)
Drainage Tile Systems/Foundation Drainage:	\$	18.00 lf	(includes excavation and backfill)

Other:

(describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- Calculation for this item will be made on a case by case basis.
- Indicate the reasons for any found deficiencies and their associated cost.

- Immediately report any condition which appears “unsafe”.

H. STRUCTURE WALLS AND CHIMNEYS

The Assessment Consultant shall look for any cracking, shifting, spalling or movement. Determine if the district has experienced any structural problems.

Tuckpointing:	\$ 7.50 sf	(wall surface)
Exterior Masonry Cleaning:	\$ 1.50 sf	(wall surface)
Exterior Masonry Sealing:	\$ 1.00 sf	(wall surface)
Exterior Caulking:	\$ 2.50 lf	(removing and replacing)
Replace Brick Veneer System:	\$ 30.00 sf	(total removal and replacement including pinning and shoring)
Lintel Replacement:	\$ 250.00 lf	(total removal and replacement including pinning and shoring)
Sill Replacement:	\$ 45.00 lf	(remove and replace)
Coping Replacement:		
Pre-finished Aluminum	\$ 22.50 lf	(removing existing coping and replacing)
Stone and Masonry	\$ 100.00 lf	(remove and replace)
Install Control Joints:	\$ 60.00 lf	

Other:

(describe “Other” items along with opinion of probable costs within recommendation section)

Additional Comments:

- Calculation for this item will be made on a case-by-case basis.
- Indicate the reason(s) for any found deficiencies and their associated cost.
- Tuckpoint up to natural breaks in walls, such as corners or control joints.

I. STRUCTURE: FLOORS AND ROOFS

Replace Wood Floor System:	\$ 45.00 sf	
Fire Rated Drywall over Existing		
Wood Ceiling Joists:	\$ 3.50 sf	(per square face feet of required drywall)

Other:

(describe “Other” items along with opinion of probable costs within recommendation section)

Additional Comments:

- **Structural wood floor supporting joists must be replaced and will result in replacing the addition with a new building.**
- Roof wood structures are permitted to remain if separated with OBBC compliant fire separation assemblies.
- Calculation for this item will be made on a case-by-case basis.
- **CAUTION:** Replacing the structural floor requires gutting the entire addition and will require other systems to be affected as follows:

Coordination Comments:

- A. Heating System: HVAC System Replacement (\$22.00/sf)
- D. Electrical System: System Replacement (\$15.75/sf)
- J. General Finishes: Complete Replacement of Finishes and Casework (varies based on type of school)
- K. Interior Lighting: Complete Building Replacement (\$5.00/sf)
- L. Security Systems (\$1.50/sf)
- M. Emergency/Egress Lighting (\$1.00/sf)
- N. Fire Alarm (\$1.50/sf)
- W. Technology: Non-OSDM Compliant (\$ variable/sf)

J. GENERAL FINISHES

The cost to replace all the finishes in a school building are listed below. Define requirement for casework within description.

<u>Partial Finish Replacement:</u>		
Paint:	\$ 2.00 sf	(floor area/prep and installation)
Acoustic Ceiling:	\$ 2.50 sf	(drop in/standard 2x4 ceiling tile per area)
	\$ 3.50 sf	(tear-out and replace per area)
VCT:	\$ 2.50 sf	(tear-out and replace per area)
Carpet:	\$ 3.50 sf	(tear-out and replace per area)
Tackboard:	\$.30 sf	(per building area)
Chalkboard/Markerboard:	\$.30 sf	(per building area)
Lockers:	\$ 1.73 sf	(high & middle school per building area)
	\$ 1.00 sf	(elementary/cubbies per building area)
<u>Complete Replacement of Finishes (excludes casework):</u>		
Elementary	\$ 10.30 sf	(elementary, per building area, with removal of existing)
Middle	\$ 10.60 sf	(middle, per building area, with removal of existing)
High	\$ 10.60 sf	(high school, per building area, with removal of existing)
<u>Complete Replacement of Finishes and Casework:</u>		
Elementary	\$ 14.30 sf	(elementary, per building area, with removal of existing)
Middle	\$ 13.85 sf	(middle, per building area, with removal of existing)
High	\$ 15.60 sf	(high school, per building area, with removal of existing)
<u>Complete replacement of Casework only</u>		
Elementary	\$ 4.00 sf	Increase based on Cost Data from OSFC work
Middle	\$ 3.25 sf	Increase based on Cost Data from OSFC work
High	\$ 5.00 sf	
Partial Casework: (base and wall)	\$ 450.00 lf	(refer to OSFC, OSDM for requirements)
Toilet Partitions:	\$ 1000.00 per stall	(removing and replacing)
Toilet Accessory Replacement	\$ 0.20 sf	(per building area)
Plaster refinishing:	\$ 14.00 sf	
Repair Drywall:	\$ 5.50 sf	
Demo & Reinstall Drywall Partitions:	\$ 6.00 sf	
Partition Open Space Classrooms:	\$ \$8.00 sf	(per building sq.ft., CMU in corridors and drywall partitions between classrooms)
<u>Lightweight Concrete Floor</u>		
Infill at Wood Floor Removal	\$ 8.00 sf	(includes removal of wood flooring and sleeper system)
Door, Frame and Hardware:	\$ 1,100.00 each	(non-ADA)
Resilient Wood/Synthetic Flooring:	\$ 12.85 sf	(tear-out and replace per area)
Terrazzo Floor Repair:	\$ 25.00 sf	(floor area affected; max. area to be 300 sf)
Basketball Backboard Replacement	\$ 3,200.00 each	(non-electric)
	\$ 6,500.00 each	(electric)
Bleacher Replacement	\$ 110.00 per seat	(based on current enrollment)
<u>Hazardous Material Replacement Costs</u>		
Acoustical Plaster Replacement	\$ 12.00 sf	
Hard Plaster Replacement	\$ 9.00 sf	
Gypsum Board Replacement	\$ 4.00 sf	
<u>Acoustical Panel/Tile Ceiling</u>		
Replacement:	\$ 1.50 sf	
<u>Laboratory Table/Counter Top</u>		
Replacement:	\$ 150.00 lf	
Door and Window Panel Replacement	\$ 200.00 ea	

Hazardous Material Replacement Costs (Cont.)

Non-ACM Acoust. Panel Ceiling

Replacement: \$ 1.50 sf

Resilient Flooring Replacement,

Including Mastic: \$ 2.25 sf

Carpet Replacement (over RFC) \$ 3.00 sf

Kitchen Equipment:

Walk-in Coolers/Freezers:	\$ 29,818.00 per unit
Fryers:	\$ 9,800.00 per unit
Floor Mixer:	\$ 9,476.00 per unit
Convection Oven (double):	\$ 12,600.00 per unit
Conventional Oven:	\$ 6,200.00 per unit
Range:	\$ 2,925.00 per unit
Mixer:	\$ 4,116.00 per unit
Hot Serving Unit:	\$ 8,148.00 per unit
Hot Food Cabinet	\$ 6,150.00 per unit
Cold Serving Unit:	\$ 6,633.00 per unit
Cold Food Cabinet:	\$ 9,900.00 per unit
Ice Maker (with bin)	\$ 4,200.00 per unit
Stationary Serving Unit:	\$ 3,300.00 per unit
Reach-in Refrigerator/Freezer:	\$ 6,433.00 per unit
Slicer	\$ 4,965.00 per unit
Kettle:	\$ 20,016.00 per unit
Pot Filler:	\$ 1,200.00 per unit
Disposer:	\$ 2,814.00 per unit
Dishwasher:	\$ 16,666.00 per unit
Soft Serve Machine:	\$ 15,000.00 per unit
Shelving and Tables (stainless)	\$ 3,325.00 per unit
Kitchen Exhaust Hood:	\$ 68,100.00 per unit

Total Kitchen Equipment

Replacement: \$141.00 sf

(square footage based upon only existing area of food preparation, serving, kitchen storage areas and walk-ins. Includes demolition and removal of existing kitchen equipment.)

Total Warming Kitchen Replacement \$87.50 sf

(square footage based upon only existing area of food preparation, serving, kitchen storage areas and walk-ins. Includes demolition and removal of existing kitchen equipment)

Other:

(describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- Casework replacement should be on an as needed basis.
- Casework is to comply with Ohio School Facilities, Ohio School Design Manual where practical.
- Assessment Consultant must determine lineal footage of casework to be replaced.
- Do not add items to kitchen, if they do not exist.
- If Terrazzo floor repair area exceeds 300 sf, budget for VCT/Carpet instead.

Additional Comments (Cont.):

- Partitioning open space classrooms is intended for buildings with an open space design where individual, separated and enclosed classrooms are desired. This includes full height CMU walls in corridors, full height metal stud and drywall partitions between classrooms and doors in lieu of moveable partitions.
- Replace kitchen equipment over 20 years old.

Coordination Comments:

- If individual Kitchen Equipment item costs exceed \$94.50 per sf of food preparation, serving, kitchen storage areas and walk-ins, replace all Kitchen Equipment at funding level above for square footage of food preparation, serving, kitchen storage areas and walk-ins. (Use existing kitchen size for calculation).
- If Acoustic Ceilings are being replaced review condition of item K. INTERIOR LIGHTING.
- If Partial Finish Replacement costs exceed two-thirds cost per sf of Complete Finish Replacement, replace all finishes at funding level for Complete Replacement of Finishes.
- When replacing kitchen equipment, evaluate kitchen equipment electrical panel for sufficient capacity.

HIGH BAY/INDUSTRIAL SPACE – LAB TYPES 5, 6, 7:

Seal Concrete Floor:	\$.30 sf	
Ceiling Replacement:	\$	3.85 sf	(high bay area only, combination exposed and acoustical ceiling)
Paint exposed ceiling	\$.50 sf	(high bay only)
Paint	\$	1.35 sf	(high bay area only)
Total Flooring Replacement	\$.75 sf	(high bay area only)
Total Finish Replacement	\$	8.00 sf	(high bay area only)

K. INTERIOR LIGHTING

The Assessment Consultant shall refer to the design manual to verify that the minimum FC levels are present. Refer to the design manual (page 8600-13 (revised 7/1/99)) for candle levels. The Assessment Consultant shall measure lighting levels in a sampling of educational spaces to determine if upgrades are necessary. Indicate within description a summary of recorded lighting levels.

Building Lighting Replacement	\$5.00 sf	Includes demo of existing fixtures
Hazardous Material Replacement Costs:		
Light (Reflector) Fixture Removal	\$3.00 sf	

Additional Comments:

- Replace all incandescent pendant fixtures, U-shaped florescent lamps and T-12 florescent lamps.
- Replace fixtures in poor condition even though foot-candle level is good.

Coordination Comments:

- If Interior Lighting is being replaced, replace Acoustic Ceilings under item J. GENERAL FINISHES.
- If sprinklers are added, remove and replace ceilings and lighting.

HIGH BAY/INDUSTRIAL SPACE – LAB TYPES 5, 6, 7:

High Intensity (High Bay) Lighting	\$6.00 Sq. Ft.
Interior Lighting	\$4.00 Sq. Ft.

L. SECURITY SYSTEMS

The Assessment Consultant shall verify that all buildings in the school district have security systems.

If none exist, use \$1.50 sf.

Security System	\$ 1.50 sf	(complete, area of building)
Partial Security System Upgrade	\$ 1.10 sf	(complete, area of building)
Exterior Site Lighting:	\$ 1.00 sf building	

Additional Comments:

- A complete security system will include access control systems, panic alarms, lock down capabilities, etc., and may include fencing (see Ohio School Facilities, Ohio School Design Manual.)

M. EMERGENCY/EGRESS LIGHTING

The Assessment Consultant shall verify that school building has a standby generator supplying emergency power to emergency/egress lighting.

Emergency/Egress Lighting:	\$1.00 sf	
Components:		
New Exit Sign	\$300.00 each	
New Emergency Light	\$350.00 each	

Additional Comments:

- All exit signs are to meet code for size and location.
- Emergency lighting must meet code for illumination levels and locations.
- New Emergency/Egress lighting must have generator back up. Unless total electric replacement is required, coordinate generator with Item U Life Safety.

N. FIRE ALARM

The Assessment Consultant shall verify that all assessment facilities have a minimum of an addressable type alarm system with strobe type devices in all occupiable spaces and pull stations at all exits.

Fire Alarm System:	\$ 1.50 sf	(complete new system, including removal of existing)
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Additional Comments:

- All corridor/room devices shall be the strobe/horn type.
- If there is not an existing system, or if present system is outdated and does not meet code, add a new system.
- If present system does not have additional expansion capability, consider replacement.
- Alarm system shall be connected to an automatic digital communicator monitored by a central station.

O. HANDICAPPED ACCESS

Wheelchair confined students and staff must have access to all instructional areas of every school. All toilet facilities, drinking fountains and door hardware must be ADA compliant.

Handicapped Hardware:	\$ 350.00 set	(includes installation/hardware only)
Signage:	\$.10 sf	(per building area)
Ramps:	\$ 40.00 sf	(per ramp/interior-exterior complete)

Lifts:	\$ 15,000.00 unit	(complete)
Elevators:	\$ 50,000.00	(per stop, \$100,000 minimum)
Electric Water Coolers:	\$ 1,800.00 unit	(replacement double ADA)
	\$ 3,000.00 unit	(new double ADA)
Toilet/Urinals/Sinks:	\$ 3,800.00 unit	(new ADA)
	\$ 1,500.00 unit	(replacement ADA)
Toilet Partitions:	\$ 1,000.00 stall	(ADA - grab bars, accessories included)
ADA Assist Door & Frame:	\$ 7,500.00 unit	(openers, electrical, patching, etc)
Replace Doors:	\$ 1,100.00 leaf	(standard 3070 wood door, HM frame, door/light, includes hardware)
	\$ 5,000.00 leaf	(rework narrow opening to provide 3070 wood door, HM frame, door/light, includes hardware)
	\$ 5,000.00 leaf	(rework opening and corridor wall to accommodate ADA standards when door opening is set back from edge of corridor and cannot accommodate a wheelchair.)

Other:

(describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- Upgrade costs include associated required electrical upgrades.
- Ramps can be used if there is run-out room.
- Existing floor-to-floor chair lifts cannot be used as a substitute for a new elevator.
- Coordinate plumbing fixtures with "E".
- Provide ADA Assisted doors per OBBC.
- Ensure room for expansion, if applicable.

P. SITE CONDITION

The Assessment Consultant shall confirm with district personnel if a deficient site condition exists. Ask the custodian and/or district personnel if the district's parking areas meet city or local codes in reference to paving.

Playground Equipment:	\$ 1.50 sf up to \$100,000	(per building square feet)
Removal of existing		
Playground Equipment	\$ 2,000.00 lump sum	
Replace Existing Asphalt Paving:	\$ 30.00 sy	(includes drainage/tear out for light or heavy duty asphalt)
Asphalt Paving (light duty)/		
New Wearing Course:	\$ 16.00 sy	(includes minor crack repair in less than 5% of paved area)
Asphalt Paving (heavy duty):	\$ 24.00 sy	
Parking Space:	\$ 1000.00 space	(ES & MS: .11 space per student, HS .42 space per Student. Parking space includes parking lot drive space.)
Bus Drop-Off:		(Allowance to assist in constructing bus drop-off at buildings where there currently is none)
	ES/MS	HS/CT
	\$110/student	\$68.75/student
		(based on current enrollment)
Concrete Curb:	\$ 15.00 lf	(new)
Concrete Sidewalk:	\$ 4.00 sf	(5" exterior slab)
Stabilize soil erosion	\$ 2.50 sf	(includes stripping and re-grading)
Exterior Hand / Guard Rails:	\$ 42.50 lf	
Sitework Allowance	up to \$200,000	(for unforeseen conditions)
<u>Hazardous Material Replacement Costs:</u>		
Soil Replacement	\$ 141.00 cy	

Other:

Storm Drainage:

Curb Cuts:

Stabilize Soil Erosion:

(describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- Review existing Bus/pedestrian/vehicular traffic separation. Assessment consultant should provide funding for paving and curbing to provide separation.
- Pave a parking lot if not currently paved.
- This could include a bad drainage condition.
- This could include a circulation problem such as handicapped inaccessibility.
- Provide playground equipment to elementaries (only) as indicated in the *Ohio School Facilities, Ohio School Design Manual*.
- Assessment Consultant to review any existing equipment.
- Bus drop off is based on current student enrollment. Combination schools will be determined by enrollment per grade level.
- A sitework allowance to accommodate unforeseen circumstances is to be included on all renovation projects. The assessor is required to manually select this as directed on the webtool instructions.

Q. SEWAGE SYSTEM

The Assessment Consultant shall verify the condition and suitability of the existing sewage system. These items are on a per school basis.

On-Site Sewage Treatment System	\$ 175.00	per students at elementary school
	\$ 225.00	per student at middle/high
Abandonment of Self		
Contained Unit:	\$ 10,000.00	lump sum
Sewage Main:	\$ 37.50 lf	(includes excavation and backfilling)

Other:

(describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- Student count is based upon current enrollment or capacity as determined in Item "E" – Plumbing; whichever is greater.

R. WATER SUPPLY

The Assessment Consultant shall verify that there are no problems in this area.

Domestic Water Booster Pump:	\$ 50,000.00	lump sum
Pressure Tank:	\$ 1.50	per gallon (new)
	\$ 2.00	per gallon (removal/replacement)
Domestic Water Main	\$ 40.00	lin. ft (new)
Well:	\$ 45,000.00	unit
Well Pump:	(5HP @ \$2,500.00/unit, 25-30 HP @ \$10,000/unit)	
Water Quality Test	\$ 500.00	(includes 2 tests)

Other:

(describe "Other" items along with opinion of probable costs within recommendation section)

Coordination Comments:

- Coordinate with Item “U” – Life Safety
- If District uses a well for potable water, determine if arsenic contamination is an issue. Contact OSFC if Arsenic Filtration System is required.

S. EXTERIOR DOORS

Assessment Consultant shall visually inspect and recommend for replacement, if needed.

Door Leaf/Frame and Hardware:	\$ 2,000.00 per leaf	(includes removal of existing)
Overhead door and hardware	\$ 2,500 per leaf	(8x10 sectional, manual operation)
<u>Hazardous Material Replacement Costs:</u>		
Fire Door Replacement	\$ 1,100.00 ea	

Other:
 (describe “Other” items along with opinion of probable costs within recommendation section)

Additional Comments:

- All exterior door and hardware must be ADA compliant.
- Replace all wood exterior doors.
- Coordinate transoms and sidelights with Item “F” Windows.

T. HAZARDOUS MATERIAL+

Effective June 1, 2001 Assessors will use the Environmental Hazards Form to establish estimates for Item T.

Additional Comments:

- **IMPORTANT NOTE TO REGIONAL PROGRAM CONSULTANTS:** If the building is intended to become a part of a district’s Master Plan, the Regional Program Consultant shall review the Enhanced Environmental Report and make any monetary adjustments required due to replacement of abated materials. The adjustments should be made per the specific line items in sections A through W herein, under the *Hazardous Material Replacement Costs* heading in each section.
- **OSFC policy is to remove all hazardous materials.**

U. LIFE SAFETY

The Assessment Consultant shall review exit corridors and include funding for eliminating existing dead-end corridor conditions. Include descriptive analysis and opinion of probable costs in recommendation section. The Assessment Consultant shall confirm that all buildings contain sprinklers. Stairs must be in two-hour rated enclosures and travel distances may require an additional means of egress. Stair railings must pass the 4” ball test. The present code requires that the guards of stair railing(s) shall not allow a sphere of 4” to pass through the balusters. An exception is made only for the triangular opening where the tread /rise / railing bottom meet to allow a 6” size sphere to pass through. In addition, the design of a guardrail should not be such that would create a “ladder effect” allowing a student to climb the railing system and therefore possibly fall over it. If water supply is from a well, assure an additional well, well pump, storage tank and generator will be required to serve the fire suppression sprinkler system.

Sprinkler / Fire Suppression System:	\$ 3.25 sf	(includes increase of service piping, if required)
Interior Stairwell Closure:	\$ 5,000.00 per level	(includes associated doors, door frames and hardware)
New Exterior Stair Enclosure	\$ 42,500.00 per level	(all inclusive)
Demo of existing stairway:	\$12,000 per floor	(per stairway, two floor minimum \$12,000, includes demo and floor construction, see comment below)

As required to provide adequate fire suppression system:		
Water Main	\$ 30.00 lin. ft.	(new)
Well Pump (Electric):	\$ 30,000.00 unit	
Well Pump for Fire Pump	\$ 20,000.00 unit	
Generator:	\$ 40,000.00 unit	(75 KW w/fence and pad/day tank only, life safety only)
Storage Tank:	\$ 50,000.00 unit	(30,000-35,000 gallon tanks)
Well:	\$ 45,000.00 unit	
Handrails:	\$ 5,000.00 level	
Retrofit existing kitchen hood with		
Fire suppression system	\$ 6,500.00 per hood	

Other:
 (describe "Other" items along with opinion of probable costs within recommendation section)

Additional Comments:

- Demo of existing stairway includes the removal of an interior stairway requiring enclosure due to fire code that cannot be enclosed because of space or other issues. The stairway will then be removed and the space used for other purposes. The cost includes the removal of the stair and any guard or handrails, installing structural steel, decking and concrete infill.

Coordination Comments:

- If a Fire Suppression System is being provided, replace Interior Lighting under item K. INTERIOR LIGHTING.
- If a Fire Suppression System is being provided, replace Acoustic Ceilings under item J. INTERIOR FINISHES.
- When specifying a fire protection system for a building currently using a well for domestic water include well pump, generator and storage tank.
- Coordinate with Item "R" Water Supply.
- If complete electrical replacement is required do not add generator.

V. LOOSE FURNISHINGS

Based on the CEFPI appraisal form, if loose furnishings are rated less than 8 under Environment for Education on Item 6.17 apply funding as listed below. If CEFPI Item 6.17 is above 8, no funding should be received.

Use the following graduated scale:

CEFPI Rating	\$/Sf Allowance
8	\$1.00
7	\$2.00
6	\$3.00
4 to 5	\$4.00
0 to 3	\$5.00

(Graduated scale based on evaluation of furnishing)

HIGH BAY/INDUSTRIAL SPACE – LAB TYPES 5, 6, 7:

High Bay Loose Furnishings allowance is \$1.00 per sqft
Add \$19,500 for Welding Tables in the Welding lab in addition to the \$1.00 per sqft for loose furnishings.

W. TECHNOLOGY

The Assessment Consultant shall determine whether the school is fully compliant with the Ohio School Design Manual (OSDM). Provide assessment funding based on the figures below.

Non-OSDM Compliant:	
ELEMENTARY SCHOOL TECHNOLOGY COST	
<u>Square Feet</u>	<u>Cost per sf</u>
<50,000 sf	\$10.68 sf
50,000 sf – 69,360 sf	\$8.96 sf
69,361 sf and up	\$7.69 sf
MIDDLE SCHOOL TECHNOLOGY COST	
<u>Square Feet</u>	<u>Cost per sf</u>
52,850 sf – 67,950 sf	\$8.78 sf
67,951 sf – 91,650 sf	\$7.47 sf
91,651 sf and up	\$6.78 sf
HIGH SCHOOL TECHNOLOGY COST	
<u>Square Feet</u>	<u>Cost per sf</u>
63,000 sf – 133,600 sf	\$7.11 sf
133,601 sf – 200,400 sf	\$5.45 sf
200,401 sf and up	\$4.48 sf

Additional Comments:

- Technology renovation calculation is based on current student enrollment. Combination schools will be determined by enrollment per grade level.

X. NON-CONSTRUCTION COST

Non-Construction costs are listed below. A construction contingency of 7% will be added to the A through W Costs.

<i>Land Survey</i>	<i>0.03%</i>
<i>Soil Borings/Phase I Envir. Report</i>	<i>0.10%</i>
<i>Agency Approval Fees (Bldg. Code)</i>	<i>0.15%</i>
<i>Construction Testing</i>	<i>0.25%</i>
<i>Printing – Bid Documents</i>	<i>0.27%</i>
<i>Advertising for Bids</i>	<i>0.03%</i>
<i>Builders Risk Insurance</i>	<i>0.11%</i>
<i>Design Professionals Compensation</i>	<i>7.50%</i>
<i>CM Compensation</i>	<i>6.00%</i>
<i>Commissioning</i>	<i>0.33%</i>
<i>Maintenance Plan Advisor</i>	<i>0.11%</i>
<i>Non-Construction Contingency</i>	<i>1.32%</i>
<i>Partnering/Mediation Services</i>	
<i>Other Contingency</i>	

Regional Cost Factors

As of April 4, 2007 Regional Cost Factors have been adjusted based upon Region 0 – Central Ohio as the base at 100.00. The other regions are as follows:

<i>Region 1 – Southwestern Ohio</i>	<i>0.9902</i>
<i>Region 2 – West Central Ohio</i>	<i>0.9976</i>
<i>Region 3 – Northwestern Ohio</i>	<i>1.0685</i>
<i>Region 4 – North Central Ohio</i>	<i>1.0235</i>
<i>Region 5 – South Central Ohio</i>	<i>1.0140</i>
<i>Region 6 – Southeastern Ohio</i>	<i>1.0050</i>
<i>Region 7 – East Central Ohio</i>	<i>1.0070</i>
<i>Region 8 – Northeastern Ohio</i>	<i>1.0416</i>

Note: The changes for 2007 are color-coded as follows:

Yellow High light:

Cost Change

Orange:

Clarification or change in comments

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

Develop Enrollment Study for a Typical K-12 School

An important component of the OSFC planning protocol is the development of student enrollment projections. Upon entering a program, OSFC assigns an educational planner to develop the enrollment projections. The objective is to determine the number of students for which the buildings should be designed. The enrollment history of the district is obtained through a district questionnaire. District demographics such as live birth statistics, housing starts and survival rates are all combined to project the district's enrollment 10 years into the future.

An Enrollment Projections Report will generally include the following information:

Historical Enrollment

For example:

Over the past eight years, student enrollment in the _____ School District has increased by 108 students in grades K – 12, including full-time JVS students. Total K - 12 enrollment for the 2002-03 school year was 1,438 students, including the full-time JVS students. The approximate percentages of mainstreamed special education students [K - 12] for the current school year are as follows:

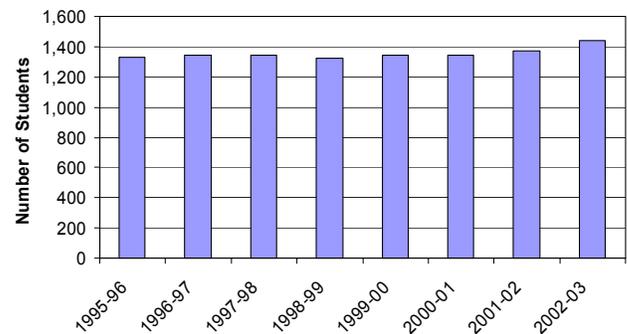
- K-5 – 9%
- 6-8 – 11%
- 9-12 – 10%

The approximate percentages of self-contained special education students [K - 12] for the current school year are as follows:

- K-5 – 0%
- 6-8 – 0%
- 9-12 – 0%

This graph illustrates the District's K-12 enrollment history from 1995 through 2002.

School District Historical Enrollment



The report itemizes historic enrollment by grade, by grade group, and by year.

Live Birth Data

Utilization of live birth data is recommended when projecting future enrollments. This provides a helpful overall trend, as well as a useful estimation of kindergarten enrollment five or six years in the future. Large bubbles in birth rates, either up or down, can also be planned for and anticipated by the district.

Live Birth Rates 1987-2001			
Year	Village of _____	_____ County	
1987	n/a	1,663	
1988		1,633	
1989		1,742	
1990		1,736	
1991		1,780	
1992		1,736	
1993		1,833	
1994		1,883	
1995		1,925	
1996		1,902	
1997		2,036	
1998		2,242	
1999		2,328	
2000		38	2,472
2001		28	2,520

Source: Ohio Department of Health, Statistical Analysis Unit

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS
 CHAPTER 1: INTRODUCTION

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

PLANNING, APPROVAL & FUNDING

Develop Enrollment Study for a Typical K-12 School, continued

Demographics

Tables such as the following are developed to show important demographic information.

Village/Township General Demographic Information Total Population		
	1990	2000
Township	5,703	7,250
Village of _____	1,978	2,558
Village of _____	223	256
_____	N/A	N/A
_____	N/A	N/A
_____ Township	13,448	20,974

Source: ODOD Office of Strategic Research

_____ County General Demographic Information	
Total Population (1990)	113,973
Total Population (2000)	158,383
Income:	
Adjusted Per Capita Income (2001)	\$27,509
Median Family Income (1999)	\$55,955

Source: US Census Bureau; Bureau of Economic Analysis

In addition to the tables, a map is generated to illustrate the percent of population change for the entire district. The maps are color-coded by growth intensity, and percentage ranges are grouped in 4 separate categories, so they can easily be analyzed spatially. Additional tables provide information about district population, household size, and family size. This data provides important information about in- and out-migration rates for the district.

Housing Information

Various tables are also developed to enumerate the likely growth in housing units in the district.

Building Permits Issued for Single Family Dwellings					
Year	_____ Township # of Permits Issued	Village of _____ # of Permits Issued	Village of _____ # of Permits Issued	_____ Township # of Permits Issued	_____ County # of Permits Issued
1991					949
1992					1,302
1993					1,466
1994	N/A	N/A	N/A	N/A	1,520
1995					1,508
1996					1,858
1997					2,165
1998	48	2	9	130	2,516
1999	55	2	12	165	2,725
2000	40	4	12	136	2,353
2001	50	1	9	148	2,649
2002	51	7	8	216	2,650
2003	44**	1**	8**	239***	1,220*
Total	288	17	58	1,034	24,881

Source: SOCDs Building Permits Database; _____ County Building Inspection Department

_____ Township					
Subdivision	Number of Lots	Section Number	Final Plat Year	Number of Zoning Permits Issued	Number of Lots Remaining
_____	29	1	1994	26	3
_____	19	1	1993	17	2
_____	1	2	1998	1	0
_____	11	3	1998	7	4
_____	1	3	2002	1	0
_____	4	4	2003	0	4
Total	65			52	13

Source: _____ Township Planning and Zoning

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

PLANNING, APPROVAL & FUNDING

Develop Enrollment Study for a Typical K-12 School, continued

Projected Enrollment

Tables (by grade and by grade group) and graphs detail the projected enrollment for a 10-year period.

_____ School District										
Projected Enrollment by Grade Group										
Grade	2003-04*	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
K - 5	588	619	646	656	707	746	750	758	760	757
6 - 8	321	301	318	332	318	305	305	352	395	407
9 - 12	431	412	374	382	365	360	396	361	352	383
K - 12 Total	1,340	1,332	1,338	1,370	1,390	1,411	1,451	1,471	1,507	1,547

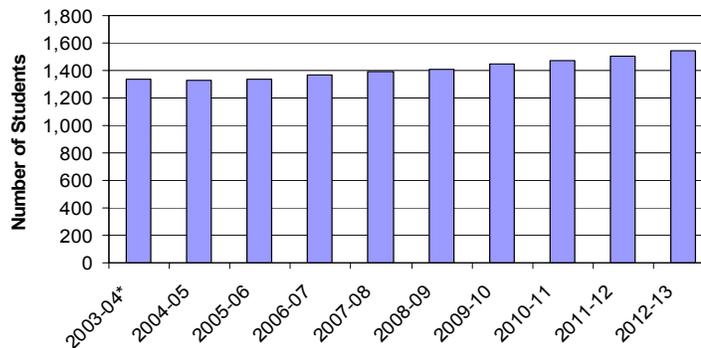
Source: DeJONG

*2003-04 projected enrollment is unofficial October enrollment provided to DeJONG by _____ School District.

_____ School District	
Master Planning Year Projected Enrollment	
Grade	2012-13
K - 12 Total	1,547
Ungraded	0
Career Tech Comprehensive	0
Career Tech On-Site	0
Career Tech Off-Site	0
Total	1,547

Source: DeJONG

_____ School District Projected Enrollment



OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

CHAPTER 1: INTRODUCTION

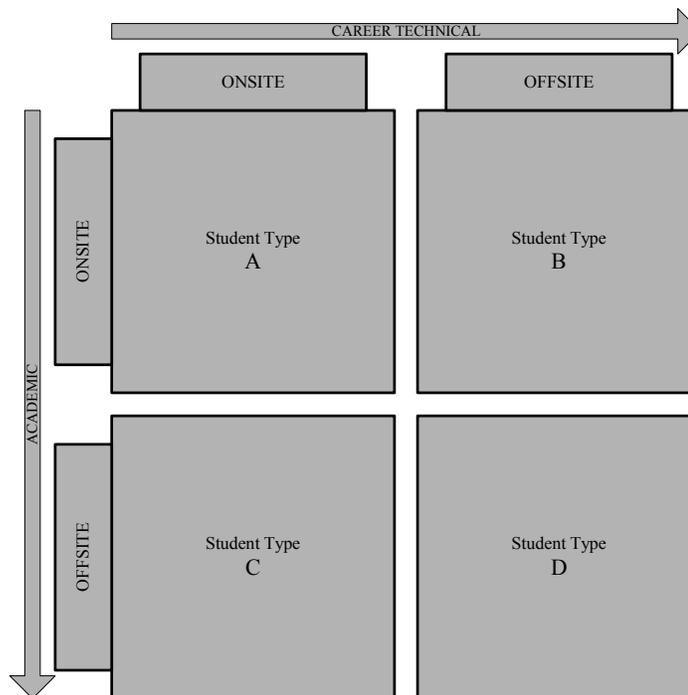
C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

PLANNING, APPROVAL & FUNDING

Develop Enrollment Study for a Career-Technical School

An important component of the OSFC planning protocol is the development of student enrollment. Upon entering the VFAP ELPP or VFAP the OSFC assigns an educational planner to produce the enrollment. The objective is to determine the number of students for which the buildings should be designed. The enrollment history of the district is obtained through a district questionnaire. Additional enrollment information is obtained from the Ohio Department of Education.

The following “Student Type” matrix illustrates the way that career-technical students are assigned to categories and enrollment is apportioned among the various secondary school types:



Student Type A – Comprehensive Career-Technical Student

Spends entire day at home high school attending academics and career-technical courses on single campus

Student Type B – Career-Technical Off-Site Student

Attends academic courses at home high school and attends career-technical courses at another location, i.e. JVS, comprehensive high school in another district, etc.

Student Type C – Career-Technical On-Site Student

Attends career-technical courses at home high school and attends academics at another location, i.e., high school in another district or high school within same district.

Student Type D – Full-Time Career-Technical Student

Attends both academic and career-technical courses at a site other than the home high school.

Student Type E – does not attend Career-Technical courses at all

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

PLANNING, APPROVAL & FUNDING

Develop Enrollment Study for a Career-Technical School, continued

An Enrollment Projections Report will generally include the following information:

Historical Enrollment

For example:

Over the past three years, student enrollment in the _____ Joint Vocational School District has decreased by 41 students in grades 11 and 12. The grand total enrollment for the 2002-03 school year was 303 11th and 12th grade students.

The following table and graph illustrate the 11-12-enrollment history from 2000 through 2003.

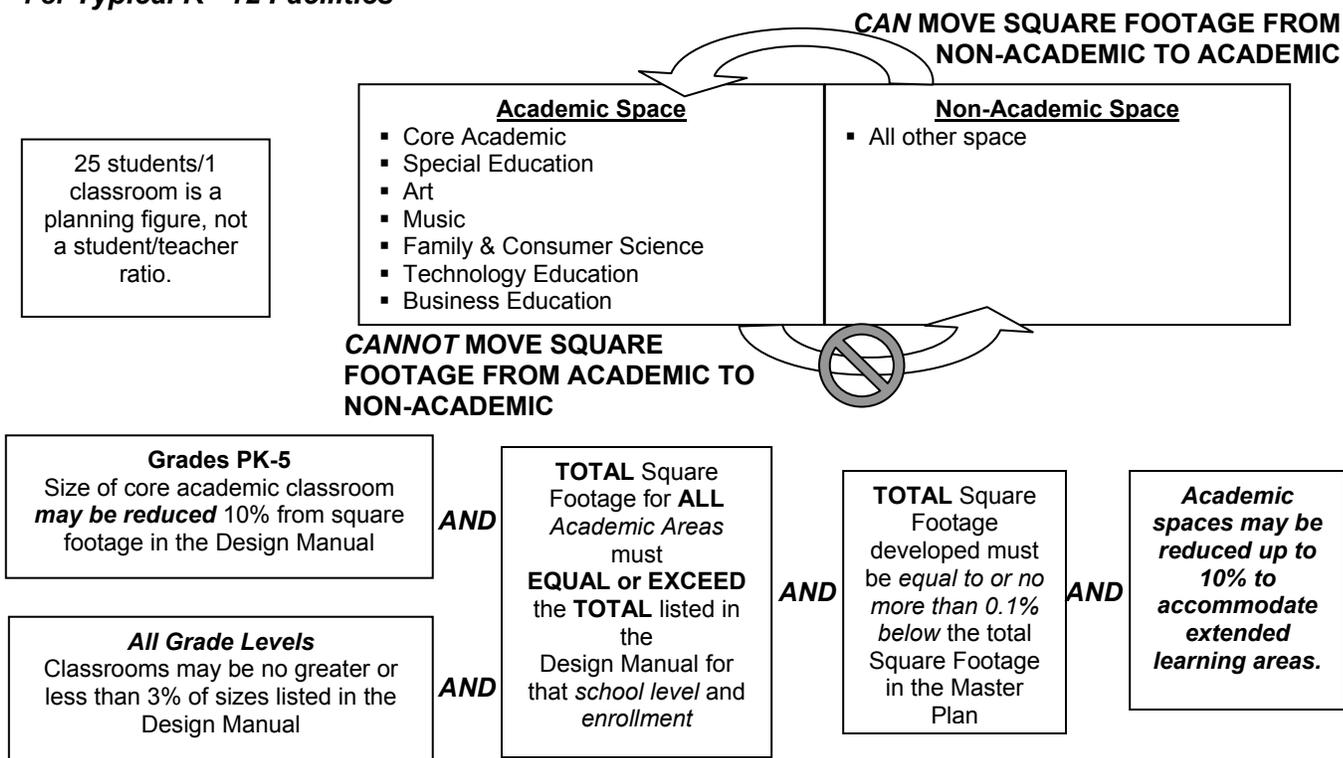
_____ JVS 3-YEAR HISTORICAL ENROLLMENT BY GRADE			
Grade	00-01	01-02	02-03
11	168	196	174
12	111	137	128
Total	279	333	303

The report itemizes historic enrollment by grade and by program area. For example, grade 11 might be:

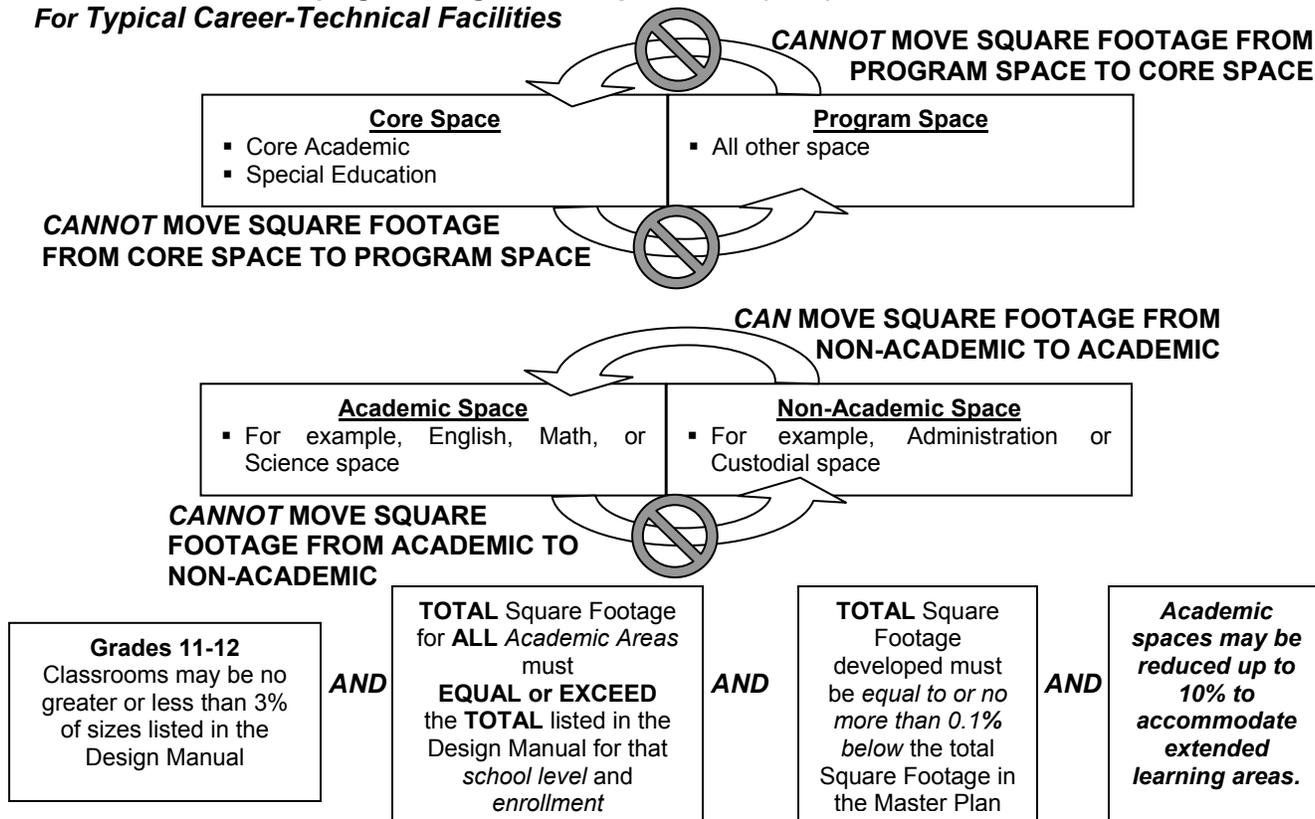
TOTAL 3-YEAR HISTORICAL CAREER-TECHNICAL SCHOOL ENROLLMENT [11 GRADE ONLY]				
Program	Subject Code	00-01	01-02	02-03
Administration/ Office Technology	14.0300	20	9	9
Agriculture/ I.E.	01.0300	14	12	9
Auto Technology	17.0302	15	19	24
Carpentry	17.1001	15	13	21
Cosmetology	17.2602	21	18	20
Criminal Justice	17.2802	10	13	9
Diversified Health Occupations	07.0998	11	21	21
Early Childhood Education & Care	09.0201	20	9	14
Graphics Occupations	17.1900	7	19	14
Machine Tool Operation	17.2303	14	19	14
Marketing	04.0800			
Welding & Cutting	17.2306	10	13	10

Source: _____

**Parameters for Developing the Program of Requirements (POR)
For Typical K –12 Facilities**



**Parameters for Developing the Program of Requirements (POR)
For Typical Career-Technical Facilities**



Parameters for Funding *Typical K –12 Facilities*

- Sources for Project Cost Local Share:**
- Bond Issue
 - Permanent Improvement Tax
 - School District Income Tax
 - Local Donated Contribution

- Basic Project Cost Calculation** considers:
- Square footage (SF) and \$/SF for grade levels to be housed
 - Variation across 9 regions in the state in construction & related costs
 - Cost of site utilities & preparation (based on average anticipated conditions)
 - Cost of insuring the project until completion
 - Partnering sessions
 - Professional planning, administration & design fees
 - Allowances for security, loose furnishings & technology

Costs Included in the Project	<p>Non-Construction Costs</p> <ul style="list-style-type: none"> ▪ Land Survey ▪ Soils/Environmental Report ▪ Agency Approval Fees ▪ Construction Testing ▪ Printing – Bid Documents ▪ Advertising for Bids ▪ Builder’s Risk Insurance ▪ Design Professional Compensation ▪ Construction Management Compensation ▪ Non-construction Contingency may include Partnering/Mediation Services, Maintenance Plan Advisor Fees, and Commissioning Agent
<p>Construction Costs</p> <ul style="list-style-type: none"> ▪ Site Costs ▪ Building Costs ▪ Furnishings (including playgrounds for elementary) ▪ Technology infrastructure, telephone system, video distribution system, computer network system ▪ Construction Contingency 	

Parameters for Funding *Typical Career-Technical Facilities*

- Sources for Project Cost Local Share:**
- Bond Issue
 - Permanent Improvement Tax
 - School District Income Tax
 - Local Donated Contribution

- Basic Project Cost Calculation** considers:
- Square footage (SF) and \$/SF for students and programs to be housed
 - Variation across 9 regions in the state in construction & related costs
 - Cost of site utilities & preparation (based on average anticipated conditions)
 - Cost of insuring the project until completion
 - Partnering sessions
 - Professional planning, administration & design fees
 - Allowances for security, loose furnishings & technology

Costs Included in the Project	<p>Non-Construction Costs</p> <ul style="list-style-type: none"> ▪ Land Survey ▪ Soils/Environmental Report ▪ Agency Approval Fees ▪ Construction Testing ▪ Printing – Bid Documents ▪ Advertising for Bids ▪ Builder’s Risk Insurance ▪ Design Professional Compensation ▪ Construction Management Compensation ▪ Non-construction Contingency may include Partnering/Mediation Services, Maintenance Plan Advisor Fees, and Commissioning Agent
<p>Construction Costs</p> <ul style="list-style-type: none"> ▪ Site Costs ▪ Building Costs ▪ Furnishings (including playgrounds for elementary) ▪ Technology infrastructure, telephone system, video distribution system, computer network system ▪ Construction Contingency 	

Parameters for Funding, continued

If the school district elects to proceed with components not listed as acceptable in the Design Manual, the school district may proceed with a locally funded initiative in addition to the required local share. Deviations should be discussed with the OSFC staff during the early planning phases of the project.

ELIGIBLE USE OF PROJECT FUNDS

- Advertising for bids
- Agency approval fees
- Allowance for abatement and demolition of facilities to be abandoned by the school district
- Builder's risk insurance
- Building construction costs
- Construction testing
- Data/computer hardware (Head-End)
- Design and construction management fees
- Land survey
- Loose furnishings
- Maintenance plan advisor fee
- Multipurpose field(s) – grading & seeding only
- Partnering (Facilitation Services & Facilities)
- Phasing and Staging Costs
- Printing of bid documents
- Project insurance (Professional Liability Insurance)
- Renovation scope as defined in the Master Facilities Plan
- Softball field(s) – grading only
- Soil borings/Phase I environmental report
- Technology infrastructure and wiring

NON-ELIGIBLE USE OF PROJECT FUNDS

- Baseball fields
- Board offices (unless included in the allowed project square footage)
- Bus compounds or garages
- Community outreach programs
- Computers/software
- Consulting services to support property acquisition
- Consulting services (supplemental to the funded architectural design and construction manager services)
- Costs associated with bond sales and other financing arrangements
- Equipment or tool sheds
- Fixed-seating auditoriums and natatoriums
- Legal representation, unless Joint Defense and Confidentiality Agreement approved by the Commission and school district
- Levy support services
- Modular tech equipment
- Multipurpose field(s) – imported fill
- Nature areas
- Off-site utilities
- Running tracks
- Site acquisition and preparation
- Soccer fields
- Sports stadiums
- Tennis courts

NOTE: This list is not necessarily all-inclusive.

Renovation vs. New Construction

The Assessment and Master Planning process is the foundation for all OSFC co-funded projects. The information created forms the basis by which the scope of the work is determined for the entire project, both for new buildings and renovated buildings.

ASSESSMENT PROCESS: OBJECTIVE

- Develop a comprehensive infrastructure assessment for the entire district, resulting in a building by building itemized scope of work & budget to construct the required improvements.
- It is expected that all of the schools will be new, or if renovated, “like new” condition, with similar amenities and life expectancy as a new building.
- Develop a *district wide* facility solution which brings *all facilities for all kids*, up to the OSFC Design Manual standards...(new, renovated or reno/additions).

The final project determines:

- Disposition of each building (*New or Reno only or Reno/Addition*)
- Number of students in each building. Grade level for each building
- Itemized scope of work for each renovated building (from assessment)
- Itemized budget for each building

ASSESSMENT PROCESS: METHODOLOGY

Assessing Characteristics Include:

- Age of system/material (i.e. roof, electrical system).
- Condition of system/material (i.e. plumb. fixtures, kitchen equipment).
- Code considerations (i.e. HVAC, stair railings).
- Does it exist? (i.e. bus drop-off, air-conditioning).
- Quantity of system/material (i.e. casework, chalkboards).
- Use existing buildings to their maximum potential enrollment (based on the OSFC standards for area per student per grade level (ie: 167 sf/students for grades 9 thru 12).

OSFC does not include

- Grade Configuration.
- Number of students in a building (subject to existing size limitation).
- Where the building gets built (subject to sign-off by OSFC).

MASTER PLANNING: STEPS

- Assure completion & accuracy of the web-based assessment.
- Assure completion & accuracy of enrollment projections.
- Develop Master Facility Plan options using web tool.
- Meet with District to present assessment and master facility plan ideas.
- Work with District to generate a mutually acceptable plan (district usually works with the community to adopt plan).
- District formally accepts plan with board resolution.

2/3rd's GUIDELINE VARIANCE PROCEDURE

It is important to remember that this is a “guideline” policy to determine whether it is feasible to renovate a building rather than replace it. It is NOT a hard and fast rule. Variances can be generated for a good cause, however, the most critical point is that the building MUST be educationally adequate.

- District asks for a variance to deviate from our guideline to replace/renovate for good cause.
 - Emphasis on the merits of the building, independent of ACG/infrastructure.
 - **Bottom Line: Will this be a good school after we are done spending money???**
- OSFC planner organizes and presents the Planning Committee for review and approval.
 - Criteria to consider
 - *Historical Significance.*
 - *Adjacency of spaces.*
 - *Means of Egress.*
 - *Circulation.*
 - *Size of Classrooms and support spaces.*
 - *Quality of Space (natural light, ceiling heights).*
 - *Ease of expansion.*
 - *Site size / configuration.*
 - *ADA considerations.*
 - *Long-term durability of existing systems*
- Again, it is important to remember that even if the variance is approved, Funding is limited to 100% the cost to replace at its correct size.

ONE FINAL QUESTION...

What about Buildings with WOOD Structures?

Assessments include cost to replace wood floor structure, and affected infrastructure.

This usually causes the building to be assessed over two-thirds. However, OSFC has developed a variance process to retain wood floor structure in a building. Concerns involve structural and fire safety. A detailed study is required to assure that these concerns can be alleviated.

2/3RD'S POLICY & 350 POLICY/LAW

2/3RD'S POLICY

The Commission, by resolution dated February 18, 1999, established a threshold to replace rather than repair or reconstruct classroom facilities assistance projects. When the cost of renovating a school facility exceeds two-thirds the cost of replacing the facility, the Commission will recommend new facilities or the population of the existing facility will be assigned to another facility.

If a School District determines that a school facility has special historical value, or for other good cause, a School District may request the Commission to evaluate a plan to renovate such facility. The Commission's evaluation of a request by a School District to renovate such a facility will be based upon two factors: 1) whether the facility can be renovated to an adequate standard for future use for classroom facilities; and 2) whether the facility can be operationally efficient. The Commission may approve renovations that cost in excess of two-thirds the cost of replacing the facility, but not in an amount exceeding the cost of a new facility.

350 POLICY/LAW

A requirement associated with the Commission's determination to approve a Master Facilities Plan is the actual or projected enrollment in each facility proposed to be included in the project. The actual or projected enrollment in each facility shall be at least 350 pupils, except in those districts where topography, scarcity of population, and other factors make larger schools impractical, pursuant to Section 3318.03, ORC. Other factors to be considered by the Commission include, without limitation, site restrictions and special populations.

§ 3318.03 Determination of District's Need for Additional Classroom Facilities.

Before conducting an on-site evaluation of a school district under section 3318.02 of the Revised Code, at the request of the district board of education, the Ohio school facilities commission shall examine any classroom facilities needs assessment that has been conducted by the district and any master plan developed for meeting the facility needs of the district.

Upon conducting the on-site evaluation under section 3318.02 of the Revised Code, the Ohio school facilities commission shall make a determination of all of the following:

- (A) The needs of the school district for additional classroom facilities;
- (B) The number of classroom facilities to be included in a project, including classroom facilities authorized by a bond issue described in section 3318.033 [3318.03.3] of the Revised Code, and the basic project cost of constructing, acquiring, reconstructing, or making additions to each such facility;
- (C) The amount of such cost that the school district can supply from available funds, by the issuance of bonds previously authorized by the electors of the school district the proceeds of which can lawfully be used for the project, including bonds authorized by the district's electors as described in section 3318.033 [3318.03.3] of the Revised Code, and by the issuance of bonds under section 3318.05 of the Revised Code;
- (D) The remaining amount of such cost that shall be supplied by the state;
- (E) If the state's portion of the basic project cost exceeds twenty-five million dollars, the amount of the state's portion to be encumbered in accordance with section 3318.11 of the Revised Code in the current and subsequent fiscal biennium's from funds appropriated for purposes of sections 3318.01 to 3318.20 of the Revised Code.

The commission shall make a determination in favor of constructing, acquiring, reconstructing, or making additions to a classroom facility only upon evidence that the proposed project conforms to sound educational practice, that it is in keeping with the orderly process of school district reorganization and consolidation, and that the actual or projected enrollment in each classroom facility proposed to be included in the project is at least three hundred fifty pupils. Exceptions shall be authorized only in those districts where topography, scarcity of population, and other factors make larger schools impracticable.

Sections 125.81 and 153.04 of the Revised Code shall not apply to classroom facilities constructed under sections 3318.01 to 3318.20 of the Revised Code.

HISTORY: 127 v 396 (Eff 6-22-57); 128 v 501 (Eff 8-5-59); 137 v H 1 (Eff 8-26-77); 140 v H 180 (Eff 5-15-84); 141 v H 201 (Eff 7-1-85); 142 v H 58 (Eff 9-10-87); 145 v H 152 (Eff 7-1-93); 145 v H 715 (Eff 7-22-94); 145 v H 552 (Eff 6-9-94); 146 v H 748 (Eff 9-17-96)*; 147 v S 102 (Eff 5-20-97); 147 v H 215 (Eff 6-30-97); 147 v H 850 (Eff 3-18-99); 148 v S 272. Eff 9-14-2000.

The effective date is set by section 9 of SB 272.

NOTE: In order to obtain a waiver, a request must be submitted to the districts contact at the Commission with valid justification.

This waiver will be reviewed by the Commission's planning team and the results returned to the district.

POLICY and PROCEDURE MEMORANDUM

PROCESS FOR SEEKING WAIVER OF THE 2/3rd's GUIDELINES FOR NEW CONSTRUCTION vs. RENOVATION

Applicable to: CFAP, ENP, VFAP, ELPP, VFAP-ELPP and Accelerated Urban Programs

The Commission, by resolution dated February 18, 1999, established a threshold to replace rather than repair or reconstruct classroom facilities assistance projects. When the cost of renovating a school facility exceeds two-thirds the cost of replacing the facility, the Commission will recommend new facilities or the population of the existing facility will be assigned to another facility.

If a School District determines that a school facility has special historical value, or for other good cause, a School District may request the Commission to evaluate a plan to renovate such facility. The Commission's evaluation of a request by a School District to renovate such a facility will be based upon two factors: 1) whether the facility can be renovated to an adequate standard for future use for classroom facilities; and 2) whether the facility can be operationally efficient. The Commission may approve renovations that cost in excess of two-thirds the cost of replacing the facility, but not in an amount exceeding the cost of a new correctly sized facility.

The cost of the work associated with the historic preservation of a facility, e.g., ornamental plaster, terracotta pieces, antique painting, will not be funded by the Commission. The cost of replacing materials with like materials, (e.g., clay tile or slate roof) will not be funded by the Commission.

OSFC recommends that the district undertake a study to assist in evaluating all of the pros and cons of renovation vs. new construction. It is strongly encouraged to use the services of a design firm to evaluate the areas that would require additional renovation in order to make an existing facility educationally adequate for the district's needs, consistent with the long term plans of the district.

Such a study should consider the educational adequacy of the facility after the renovation proposed in the assessment report and to propose any additional renovation in order to address issues of educational adequacy. Additionally, such a study may consider the decision to renovate vs. replace in the context of the entire master plan and the practical considerations of phasing of work, making space available for instruction during the build out of the entire district's facility needs, site constraints and community concerns.

The architect should provide commentary to describe the issues and concerns that they would have with the current building use and issues that may need to be addressed if the building were renovated for educational use. Such issues should include, but are not limited to:

- 1) Adjacency of Uses: Specifically identify any uses or support spaces that should be relocated for functional reasons.
- 2) Means of Egress: Are the means of egress generally adequate? Note instances of dead end corridors and corridors that are too narrow and name any spaces that must exit through another occupied space.

- 3) Circulation: Is the circulation logical? Does the circulation flow well for use & egress? Specifically identify any instances where circulation should be changed.
- 4) ADA Door Alcoves: Do corridor walls require alteration in order to provide proper ADA access? If so provide the number of instances.
- 5) What is the size or range sizes of the typical classroom? What is the typical number of students per classroom?
- 6) Open Stairwells: Note the number of instances. Note rooms which have doors off stairwells.
- 7) Ease of Expansion: Note if there is not an apparent solution to providing an addition to the building.
- 8) Site Conditions: Can a separate bus drop-off be accommodated? Can adequate parking & playground areas be created?
- 9) Reprogramming: If the building will not receive an addition, does it require extensive wall relocations?

If the district wishes to keep and renovate an existing facility which was assessed at above 2/3rds the cost of new construction, the district should provide, in writing, information and evaluations outlined above to the OSFC planning manager for variance consideration by the OSFC.

OSFC Planning Review Form

School District:

Date:

OSFC Program:

ELPP Equity Rank:

Request:

CEFPI Rating:

Rationale:

Existing buildings:

	Grade Config	# of Students	Existing Area	2/3 Ratio	Site Area
• Franklin Elementary	PK-5	450	32,653sf	86%	1.8ac
• Horace Mann	PK-5	450	88,170sf	69%	3.0ac
• Lincoln Elementary	PK-5	450	75,860sf	76%	.9ac
• Roosevelt Elementary	PK-5	450	70,500sf	75%	2.6ac

- District-provided letter of request
- District has done extensive community involvement and “existing vs new” studies, walk-ability studies, site location studies, etc.
- Historic character of architecture / neighborhood fabric
- Essentially new build...keep exterior walls (all 4 bldgs)
- Architect has done preliminary site studies to confirm program application
- Architect has done POR and initial SD studies to confirm program application to existing bldg

Written by:

Approved

Denied

EVALUATION OF EXISTING FACILITY for 2/3RDS VARIANCE

School District _____ School Name _____ Date _____

- 1) **Adjacency of uses** (Specifically, identify any uses or support spaces that should be relocated for functional reasons)

- 2) **Means of Egress** (Are the means of egress generally adequate; note instances of dead end corridors and corridors that are too narrow, and name any spaces that must exit through another occupied space)

- 3) **Circulation** (Is the circulation logical, flows well for use & egress, specifically identify any instances where circulation should be changed)

- 4) **ADA door alcoves.** (Do corridor walls require partial demolition in order to provide an alcove for ADA access? If so provide the number of instances.)

- 5) What is the **size** or range sizes **of the typical classroom**? What is the typical number of students per classroom?

- 6) **Open Stairwells** (note the number of instances; note rooms which have doors off stairwells.)

- 7) **Ease of expansion.** (Note if there is not an apparent solution to providing an Addition to the building.)

- 8) **Site conditions** (Can a bus drop be accommodated? Can adequate parking and playground areas be created?)

GENERAL RESPONSE: _____

Report by _____ Date _____

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

CHAPTER 1: INTRODUCTION

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

Develop Master Facilities Plan Specifying Scope and Cost for K-12 Schools

After the Assessment and Enrollment Projection reports are completed, the Master Facilities Plan is developed to define the scope of work and budget for each of the district's classroom facilities. The number of students projected for each school is entered into the grade level-appropriate spreadsheet in the Design Manual to determine the total gross square footage for that school in the Master Facilities Plan. Square foot allowance charts can be found in Chapter 2, Section 2000 of the Design Manual. When Career-Technical programs are provided at the facility, the projected enrollment in the Career-Technical program is used along with the types of programs to develop a space allocation for those high schools housing Career-Technical programs.

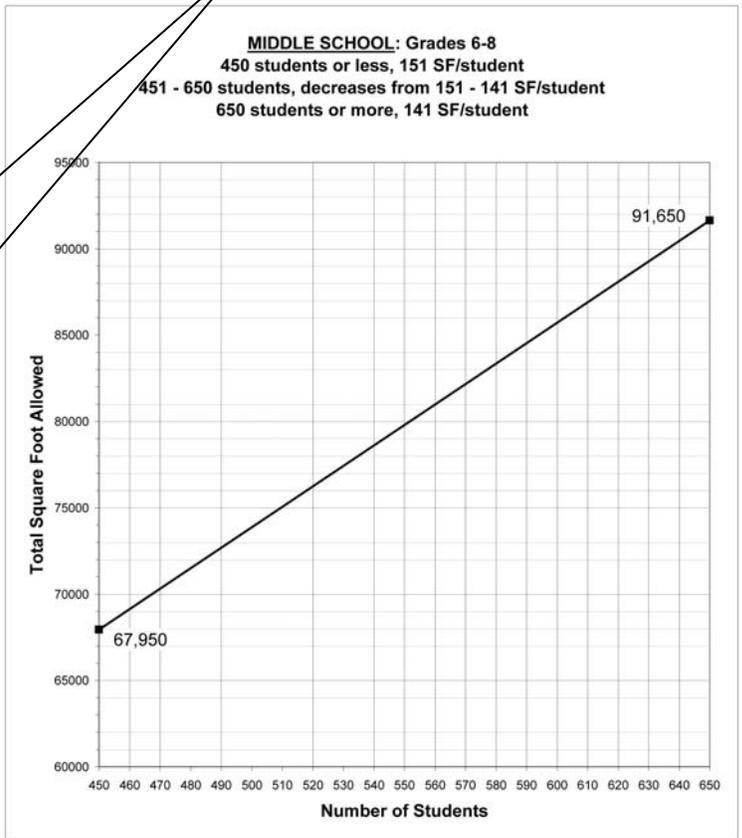
The square footage for each school is then multiplied by the allowable cost per square foot for that school level and school size (data found in Section 1200 of the Design Manual). All buildings in the district are aggregated to determine the overall budget for the Master Facilities Plan.

To determine the gross square footage for a school building, enter the number of students.

MIDDLE SCHOOLS SQUARE FOOT ALLOWANCE

CHAPTER 2: BRACKETING

Enter # of students
SF/student 147.75
Total SF for building 73,875



PLANNING, APPROVAL & FUNDING

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

PLANNING, APPROVAL & FUNDING

Develop Master Facilities Plan Specifying Scope and Cost for Career-Technical Schools

After the assessment and enrollment reports are completed, the Master Facilities Plan is developed to define the scope of work and budget for each of the district's classroom facilities. The number of career-technical students for each school is entered into the core space spreadsheet in Chapter 2 of the Design Manual (Career-Technical section) to determine the total gross core square footage for that school in the Master Facilities Plan. The program area is determined by developing a program of requirements. Square foot maximum charts can be found for both core and program areas in Chapter 2, Section 2700 of the Design Manual (Career-Technical section).

The core square footage for each school is then multiplied by the allowable cost per square foot for that school level and school size (data found in Section 1200 of the Design Manual). All buildings in the district are aggregated to determine the overall budget for the Master Facilities Plan.

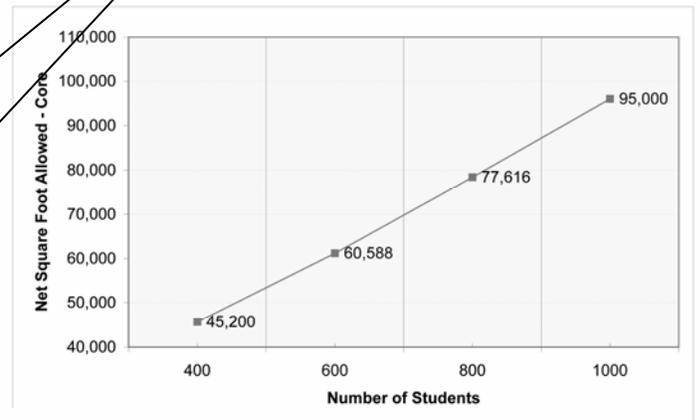
To determine the maximum gross core square footage for the Core Spaces enter the number of students.

CAREER-TECHNICAL SCHOOLS
GROSS SQUARE FOOT MAXIMUM - CORE SPACES

Enter # of Students	900
SF/Student	95.90
Gross SF for Core Spaces	86,308

Career-Technical School

400 students or less,	113 SF/student
1,000 students or more,	95 SF/student



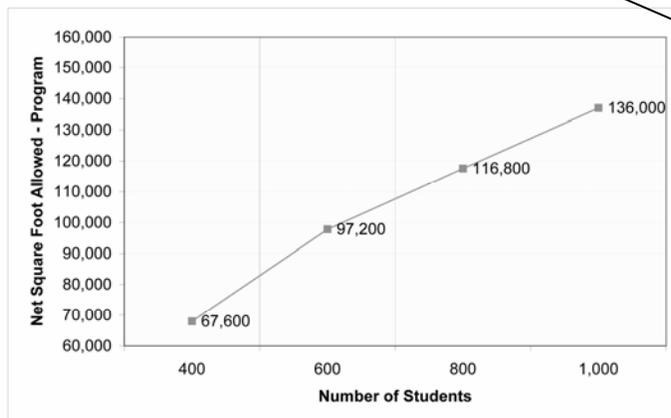
CHAPTER 2: BRACKETING

CAREER-TECHNICAL SCHOOLS
GROSS SQUARE FOOT MAXIMUM - PROGRAM SPACES

Enter # of Students	900
SF/Student	140.44
Gross SF for Program Spaces	126,400

Career-Technical School

400 students or less,	169 SF/student
1000 students or more,	136 SF/student



To determine the maximum gross square footage for the Program Spaces enter the number of students.

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

CHAPTER 1: INTRODUCTION

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

PLANNING, APPROVAL & FUNDING

Develop Master Facilities Plan Specifying Scope and Cost for Career-Technical Schools, continued

Due to the unique nature of Career-Technical program spaces, the methodology for determining space (square footage) requirements for program areas is different than the methodology used for core academic areas.

The space requirements for program areas is program driven: Each of the 80+ Career-Technical Programs recognized by the Ohio Department of Education is assigned to one of seven Program Types which outlines the general lab space, general support spaces, and program specific support spaces identified for a given Career-Technical Program.

The space requirements for the core academic areas of a stand alone Career-Technical facility is student population driven: Much like the methodology in the K-12 Design Manual, the number of students in a facility drives the space requirements for core facilities including areas such as academic classrooms, science & computer labs, administration, media centers, dining & kitchen areas, custodial & general service spaces.

Because of the unique challenges presented by Career-Technical facilities in developing an appropriate and equitable Program of Requirements (POR), there are several guidelines adopted by the OSFC to manage the development of the POR and the subsequent facilitation of a funding level for a given project.

Program of Requirements (POR) Guidelines

1. The OSFC will use the highest enrollment in the preceding 3 years for the student enrollment.
2. The assessment of existing facilities will take into account Career-Technical Programs that are approved by (not just applied for) the Ohio Department of Education for the specific Career-Technical facility.
3. Program spaces and core spaces are considered separately in determining the square footage deficiencies and credits in a POR. Additional space allowed for program areas cannot be applied to core area deficiencies or vice-versa. The final use of existing space is not restricted, however, as existing core space could be converted to program space and vice-versa if it balances with allowable programming guidelines and the efficient disposition of space within the facility.
4. Spaces in existing facilities which are not indicated in the Career-Technical sections as approved and funded core or program spaces will be disregarded in the assessment of a career-technical facility and the development of a fundable POR. For example, adult education only spaces, district administration, county service offices, auditoriums and convocation spaces, etc. will not be included in assessment or determination of net and gross square footage calculations.
5. Core space assessment which determine square footage deficiencies and allowed expansion must address academic classroom requirements first before addressing any other areas of allowed core spaces.
6. As a cap to the POR, the ratio of total students to program spaces must be a minimum of 30:1 for Lab Types 5-7 and a minimum of 50:1 for Lab Types 1-4.

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

CHAPTER 1: INTRODUCTION

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

PLANNING, APPROVAL & FUNDING

Develop Master Facilities Plan Specifying Scope and Cost for Career-Technical Schools, continued

7. As a cap to the development of program and core space requirements, the gross funded square footage indicated in a fundable POR cannot exceed the sq.ft. per student per the Gross Square Foot Allowance Chart on page 2000-2.
8. Program Type 7 covers extraordinary sized programs. The fundable limit for Program Type 7 areas shall be 10,000 sq.ft.
9. Any existing lab space which is assessed at less than 75% of its recommended square footage will be eligible to receive funding for an addition and/or a renovation of other available existing space within the facility. The total fundable square footage is still subject to all other guidelines as listed.
10. The square footage calculations for the master plan are based on the assumption of all day student participation. Deviation from this assumption will be addressed on a case by case basis.
11. The career-technical facility must complete the POR phase of pre-design prior to final acceptance/approval of the Master Facilities Plan. The district has the option of using the OSFC assessment consultant or their selected design professional to complete this phase.
12. Renovations and expansion of core and program spaces in excess of these guidelines must be funded by local initiative in addition to the local + state share of the master plan.

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

CHAPTER 1: INTRODUCTION

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

Example of a High School Master Facilities Plan including Career-Technical Areas

Master Plan Name

Classroom Facilities Assessment Program
 Rank
 School District
 School District IRN
 County
 Cost Region
 Assessing Consultant
 Educational Planner

When additions are highlighted for an existing school, this is an indication these additions are to be demolished.

Assessment summary

Number of students to be housed in facility by grade group and allowable square feet

Estimated project cost based on square footage by grade group

Building	K-12
Type	High
Acres	
Grades Housed	9th - 12th
Current Enrollment	NA
Additions to Demolish	
Grades Housed - Proposed	PK-12
Projected Enrollment	851
CT Projected Enrollment	130
Scope of Work	New
CEFPI Rating	
Existing ft ² (all)	
Cost/ft ² (DM)	
Cost to Replace	\$0
Cost to Renovate	
Renovate+Replace	
CT Core Cost to Replace	—
CT Core Cost to Renovate	—
CT Core Renovate+Replace	—
CT Program Cost to Replace	—
CT Program Cost to Renovate	—
CT Program Renovate+Replace	—
Total Renovate+Replace	—
Addition Required	
—	Addition ft²
Elementary (PK-5)	
Projected Enrollment	435
ft ² /Student	116.58
ft ² Required	50712
Middle (6-8)	
Projected Enrollment	213
ft ² /Student	143.43
ft ² Required	30551
High (9-12)	
Projected Enrollment	203
ft ² /Student	170.98
ft ² Required	34,709
Career Technical Core Space	
Projected Enrollment	130
ft ² /Student	118.00
ft ² Required	15,340
Total ft ² Required	131,312
ft ² Existing	0
Oversized ft ²	
Less Oversized ft ²	0
CT ft ² Existing (subtract)	0
CT ft ² Not Programmed (add)	0
Less CT ft ²	0
Addition ft ² Needed	131,312
Cost per ft ²	
Total Addition Cost	\$0
—	Cost of Additions
Elementary (PK-5)	
Total ft ² Required	50712
Cost/ft ² (DM)	153.38
Cost to Rebuild	\$7,778,252.57
Middle (6-8)	
Total ft ² Required	30551
Cost/ft ² (DM)	157.36
Cost to Rebuild	\$4,807,440.84
High (9-12)	
Total ft ² Required	50,049
Cost/ft ² (DM)	164.48
Cost to Rebuild	\$8,232,049.65
Career Technical Program Space (from CT Summary)	

Projected Enrollment (10 Yr)

Grade	PE (10 Yr)	Grade Configurations
	2007-08	
PK	3	
K	70	PK-5
1	71	435
2	65	6th-8th
3	67	213
4	84	9th-12th
5	75	203
6	64	PK-8th
7*	80	648
8	69	6th-12th
9	81	416
10	80	PK-3
11	22	276
12	20	
***	851	

CT-Comp	82
CT off	48

981

Enrollment projections summary

PLANNING, APPROVAL & FUNDING

OVERVIEW OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS

CHAPTER 1: INTRODUCTION

C. DETAILS OF THE PLANNING, DESIGN, AND CONSTRUCTION PROCESS, continued

Example of a Career-Technical Program of Requirements (POR)

PLANNING, APPROVAL & FUNDING

	Taxonomy Number	SF EXIST	SF ALLOW	SF REPROG	COST REPROG	SF NEW	COST NEW			COST TOTAL	Final SF
Number of Students - Total		82	2 Programs								EXISTING
Number of Students - Low Bay		50	1 Program								
Number of Students - High Bay		32	1 Program								
Gross SF per Student Funded											+
Total Gross SF Funded											NEW
Program Type 1											
Program Type 2											
Program Type 3											
Marketing Technology	14.0830		2,220			2,220	\$ 511,571		\$ 511,571		2,220
Program Type 4											
Program Type 5											
Agrbusiness and Production Systems	1.0301		6,763			6,763	\$ 1,412,091		\$ 1,412,091		6,763
Program Type 6											
Net Program Spaces						8,983	\$ 1,923,662		\$ 1,923,662		8,983
								Regional Cost Factor	1.0000	\$ 1,923,662	
Mech./Electrical Space (5.0%)						449		Mech./Electrical Space (5.0%)	\$189.13	\$ 84,948	449
Corridors (14%)						1,258		Corridors (14%)	\$189.13	\$ 237,854	1,258
Total Program Space						10,690		Total Program Space		\$ 2,246,464	10,690
Construction Factor (11%)						1,176		Construction Factor (11%)	\$189.13	\$ 222,417	1,176
Total Gross Program Space						11,866		Total Gross Program Space		\$ 2,468,880	11,866
Maximum Gross Program SF Co-Funded											
Program SF/Student			0 SF per Student			145 SF per Student				SF per Student	145
SF NOT USED IN POR		0								Allowable SF	169

POLICY and PROCEDURE MEMORANDUM

EXCESS SQUARE FOOTAGE IN RENOVATED FACILITIES AND LOCALLY FUNDED INITIATIVE

Applicable to: CFAP, ENP, VFAP, ELPP, VFAP-ELPP and Accelerated Urban Initiative Programs

Definitions:

Oversize Design Manual Space: Certain core area or common spaces (gymnasium, media center, kitchen, dining area, Ag. Ed., vocational, and corridors) are considered oversized if the existing square footage of the space exceeds that recommended in the design manual. The amount by which the area in each space exceeds the design manual recommended square footage is the oversize space. Oversize Design Manual Space is not used in calculating the student capacity of the building.

Oversize Non-Design Manual Space: Spaces used for school use but not included in the design manual (auditoriums, natatoriums, indoor tracks) and space used for non-school use (adult education, board offices, or county programs or other agencies). This space is not used in calculating the student capacity of the building.

Oversize Unusable Space: Space, which, by its physical configuration or nature, is not suitable for use as classrooms or other program areas (all or part of a basement or a clock tower). This space is not used in calculating the student capacity of the building.

Excess Area: Space used to serve the district's educational needs and is shown in the OSDM but is more than that required to serve the student population assigned to the building. Excess Area is calculated building wide and equals the area of the building minus the area required to serve the number of students assigned, minus all Oversize Design Manual Space, minus all Oversize Non-Design Manual Space, minus all Oversize Unusable Space.

LFI Square Footage

In a renovated building the Commission will limit the square footage, which is fully co-funded, based on the calculation of the square foot per student in the Basic Project Cost rule, with exemption provided for Oversize Design Manual Space.

In a renovation project a locally funded initiative will be required when the square footage of the facility exceeds that required to house the planned student population and results in Oversize Non-Design Manual Space, Oversize Unusable Space, or Excess Area.

Oversize Design Manual Space

The Commission will fully co-fund Oversize Design Manual Space. The scope and budget of the renovation of Oversize Design Manual Space will be the same as that presented in the final assessment report. The district may not elect to forgo or reduce the scope of renovations in the Oversize Design Manual Space.

Oversized Non-Design Manual Space, or Oversized Unusable Space

The Commission co-funds the cost of providing fire protection, fire alarm and emergency egress lighting in Oversized Non-Design Manual space and in Oversized Unusable Space. The cost of any other renovation work is the responsibility of the district as a local initiative.

The scope of the renovations must include items, which are necessary to protect the integrity of the building (such as roofing replacement, structural repairs etc.). The district may elect to include other items indicated in the assessment report (such as finishes and basic building services) or may elect to provide other scope not in the assessment report (premium finishes and furnishings or non-design manual compliant mechanical systems).

The LFI budget for renovation will be determined by the district and the Commission using the 23 line item budgets of the assessment report for costing. The cost of scope which is not included in the assessment cost guidelines will be estimated by the construction manager or regional program consultant. The LFI budget will be part of the project agreement.

Excess Area

Space used to serve the districts educational needs and is shown in the OSDM but is more than that required to serve the student population assigned to the building.

In Excess Area the Commission will co-fund the fire protection, fire alarm and emergency egress lighting scope presented in the final assessment report. The balance of the renovation scope in Excess Area is the responsibility of the district as a locally funded initiative (LFI).

The scope for the renovation of Excess Area will be the same as that presented in the final assessment report. The district may not elect to forgo or reduce the scope of renovations in the Excess Area.

If a district can clearly demonstrate that current educational area can be reprogrammed for non-school use it may be considered as Oversize Non-Design Manual Space.

The LFI budget for renovation of Excess Area will be the average of the square footage renovation cost of the entire building multiplied by the Excess Area, minus the renovation budget for fire protection, fire alarm and emergency egress lighting. The LFI budget will be part of the project agreement.

Final Value of LFI Work

The final value attributed to LFI work will be calculated based on the methodology used to establish the LFI budget using the actual bid and construction costs incurred for the project.

PROPERTY ACQUISITION

Property Acquisition

The Commission's programs do not provide funding for costs associated to acquire and prepare a site for the construction of new classroom facilities, nor for property appraisal, real estate, or legal services associated with real property acquisition. A School District may combine the request for site acquisition costs in the same ballot issue with the School District's portion of the basic project cost, as well as the 1/2 mill maintenance requirement, pursuant to Section 3318.06(D), ORC. The Commission may prohibit a School District from proceeding with any project if the Commission determines that the site is not suitable for construction purposes, pursuant to Section 3318.08 (Q), ORC.

A School District may apply the proceeds of the 1/2 mill levy for maintenance for infrastructure improvements on and leading to a project site when those improvements are not included in the project cost, pursuant to Section 3318.17(D), ORC. Proceeds of the tax can only be used for infrastructure improvements during the three-year period following the execution of the Project Agreement. If a School District chooses to use the proceeds of the tax for infrastructure improvements, it must indicate this intention in the ballot language proposing the levy.

Site Acreage

The Design Manual provides recommendations for site acreage to accommodate the size of the classroom facilities being constructed. The Commission recognizes that the availability of land is a constraint in urban centers. The Commission recommends the Architect evaluate the adequacy of site acreage in relation to the School District's program for the classroom facilities, the outdoor programs the School District desires to provide at each location, as well as circulation and parking.

Abandoned Facilities/Demolition Allowance

Whenever a classroom facility is to be abandoned according to the Master Facilities Plan, the School District may select one of the following options for the disposition of the abandoned real property. The School District Board may: 1) use the facility for a non-educational purpose; 2) transfer or sell the facility pursuant to the requirements of Section 3313.41, ORC; or 3) demolish all or part of the facility. An allowance is provided in the budget for demolition of facilities that are being replaced. The State share of any unused portion of the demolition allowance shall be withheld by, or returned to, the Commission upon completion of the Project.

POLICY AND PROCEDURE MEMORANDUM

SITE DEVELOPMENT COSTS POLICY

Applicable to: CFAP, ENP, ELPP, VFAP, VFAP-ELPP and Accelerated Urban Programs

Definition Of Site

As co-owners and funding partners, both the Commission and school districts have a responsibility to select a “buildable site” that meets the educational delivery needs of the district without requiring an unreasonable amount of site preparation or development work. A site is defined as the area upon which the building is held or “building footprint,” in addition to land that is germane to the educational purposes of the district. The Ohio School Design Manual provides recommendations for site acreage to accommodate the size of classroom facilities to be constructed with variations for urban areas due to size constraints. State funds shall not be provided for site development costs that are outside of the purview of the definition provided herein of school site. Site development costs outside the development limits will not be co-funded.

Proper Due Diligence Requirement

Districts are required to complete and return the Site Evaluation Submittal Form, along with any necessary attachments and proper signatures from experts and authorities prior to signing the Project Agreement. Should a site not be under consideration at the time that the Project Agreement is signed, the district agrees to provide this information as soon as a site is selected prior to the Program of Requirements phase of the project. This clause shall be written into the Project Agreement. The Commission will not approve a Program of Requirements Phase submission until the district has acquired such property. The Commission will consider that the district has acquired a property if there is a legitimate and present expectation of legal possession of the property. The Commission may request evidence to this fact.

Rejection Of Unreasonable Sites

As stipulated in ORC 3318.08(S), the Commission reserves the right to reject a site that has been selected by the district should the estimated amount of site work be deemed unreasonable based on information obtained in the site evaluation. Recommendations from the architectural firm, construction manager, and local planning authorities will be used to make this determination. This provision holds in all situations, unless the district can show that no other more suitable site exists or that acquiring another site would pose an unnecessary hardship to the district. If a district desires, it may locally fund these excess costs of the site.

Co-Funded Vs. Locally Funded Items

State matching funds may be used to provide for a reasonable amount of site work for items that have been identified through the site evaluation submittal process. Funds will be provided in the site budget and may be bid separately or as a site package. All efforts should be made to identify expected site expenditures prior to finalizing the budget. Certain items will not be co-funded under any circumstance. These items may be funded through local funds.

ITEMS ELIGIBLE FOR CO-FUNDING INCLUDE, BUT ARE NOT LIMITED TO:

- Site investigation services including, but not limited to: Phase I and II Environmental Assessment, Traffic Impact Studies, Soil Borings, and Land Surveys for sites where a school is constructed. Upon review by experts of the Phase I Assessment, the Commission may recommend that a Phase II Assessment be performed.
- Demolition of classroom facilities abandoned by the school district as identified in the Master Facilities Plan
- Grading and seeding for multi-purpose and softball fields
- On-site utilities and transportation pathways including roads, driveways, sidewalks, paving, parking lots, water, sewer, electricity, gas and lighting
- Site furniture and playground equipment
- On-site earthwork
- On-site landscaping for plantings and seeding
- On-site storm drainage systems
- Removal of underground fuel tanks used to serve an existing school, excluding soil remediation
- On-site utility tap-in fees

ITEMS TO BE LOCALLY FUNDED (ITEMS NOT ELIGIBLE FOR CO-FUNDING) INCLUDE, BUT ARE NOT LIMITED TO:

- Excessive tree removal
- Remediation or abatement of hazardous materials, soils or other contaminants
- Removal of existing structures or remnants of historical or current uses
- Purchase of property and consulting services to support property acquisition
- Preparation such as grading and seeding for athletic fields other than that which is afforded in the Ohio School Design Manual
- Site work such as seeding, soil removal, and grading for purposes that are not germane to educational delivery purposes
- Local code requirements exceeding Ohio School Design Manual requirements for items such as signage, streetlights, fencing, irrigation systems for plantings, etc.
- New rights-of-way or easements for off-site areas
- Pass-through utility relocations within easements on the property
- Plat consolidations costs
- Wetland relocation or banking

Site Evaluation Submittal Checklist

OSFC's *Site Development Costs Policy* (effective May 1, 2005) requires school districts to engage in due diligence prior to beginning construction on a site. Please answer all questions and provide appropriate attachments for each item as necessary. In addition to the following information, a concept drawing(s) depicting basic site characteristics including, but not limited to: *north/south orientation, roadways, rivers and other waterways, topography, existing structures, and sewer lines*. The site address and/or approximate location information should be included.

Site Location:

Is the site located within one mile of state route or US Highway? If yes, has the district contacted the Ohio Department of Transportation for feedback on access to the site? Yes No Attach

Site Size:

Does the site meet minimum OSFC guidelines as presented in the OSDM? Yes No Attach

Is the site shape approximate to fit the building and site amenities? Yes No Attach

Has a Traffic Impact Study been prepared for the site? What are the results? Yes No Attach

Topography:

Does the site have sufficient level area to accommodate the building? Yes No Attach

Will there be sufficient natural storm drainage? Yes No Attach

Testing:

Has a Phase I environmental assessment been done? Yes No Attach

Has a Phase 2 environmental assessment been done? Yes No Attach

Are hazardous materials present? What plans for remediation exist? Yes No Attach

Has any Geo-Tech testing been done? Yes No Attach

Site Survey:

Has a site survey been done? Yes No Attach

Are easements or rights-of-way present on the site? Yes No Attach

Will easements or rights of way adversely affect the site development? Yes No Attach

Does the site have zoning or deed restrictions that prohibit proper development? Yes No Attach

Are safety concerns such as railroad tracks or high-voltage lines present? Yes No Attach

Is any part of the site located in a flood plain? Yes No Attach

Are there any wetlands or waterways on the site? Yes No Attach

Soil Characteristics:

Is the subsurface condition suitable for standard footing design? Yes No Attach

Are subsurface groundwater levels suitable? Yes No Attach

Is rock present on the site? Yes No Attach

Site Utilities:

Is storm water detention feasible? Yes No Attach

Is an approved storm water outlet available? Yes No Attach

Will an on-site sewage treatment system be required? Yes No Attach

Is a domestic water line available to the site? Yes No Attach

Does the waterline provide sufficient capacity for complete fire suppression? Yes No Attach

Have all utilities been located for a site entry location? Yes No Attach

Site Preparation:

Are there any known structures that were demolished on the site? Yes No Attach

Is demolition of existing structures required? Yes No Attach

Are underground storage tanks present on site? Have plans been made to remove them? Yes No Attach

Has appropriate environmental testing been done for demolition or tank removal? Yes No Attach

Is adequate space available for construction staging? Yes No Attach

Please include any other relevant information pertaining to the site in question that has not been included in this checklist.

BEST PRACTICES IN PLANNING BEYOND THE PROPERTY LINE

(Issues Affecting Site Selection)

The Ohio School Facilities Commission does not offer funding or management assistance to school districts in working with local government agencies to provide for transportation, sewer, water, or power extensions to the selected site. Obtaining utilities is the primary responsibility of the school district, in cooperation with local, county, and state authorities. Therefore, it is important that district administrators be knowledgeable about various aspects of planning for the site, including working with local and state government authorities, obtaining utilities, and evaluating site selection criteria. The following is a short list of factors to consider. This list is by no means exhaustive. **Please consult the Ohio School Facilities Design Manual for further information.**

GENERAL SITE SELECTION AND PLANNING

- **Select a site that can be easily and economically connected to existing infrastructure and streets.** When reviewing site options, keep in mind that the farther away the new school is from existing development, the greater the cost of extending infrastructure to the new site. Local governments need to be cost-efficient when planning for future development. Even if the land price of a parcel outside the city limits is less than land near and existing neighborhood, the cost of extending streets and utilities to the site may make it more expensive in the end. Where roadways, water, sewer, recycling and utility lines are already in place or require minimal extension, the infrastructure costs of development can be significantly reduced. At the same time, the environmental impacts of development are reduced and undeveloped land is reserved.
- **In the pre-construction planning phase, bring knowledgeable school personnel to the table to help you plan.** Include maintenance personnel, facilities managers, Information Technology personnel, and heads of academic departments (e.g. science, industrial technology, special education administrators, etc.). Tap into your local district personnel resources to gather important input into district needs. As specialists in their particular academic discipline or district office, they can provide valuable advice in the pre-construction phase. Be sure to not overlook them.
- **Be aware of timelines and plan your building schedule accordingly.** To save time and money, avoid delays by planning ahead and working within a designated time frame. Contact your Project Administrator for information on deadlines and to help you plan a schedule to adhere to.
- **Consider site size in selection of a site.** It is important to determine whether the size of the proposed site will be sufficient to accommodate the intended school use. Urban schools may be particularly challenging. You should ask the following questions: Does the potential site accommodate the building “footprint” and provide outdoor recreational opportunities? Can bus drop off and other student arrivals and departures be accommodated safely? Can parking needs be addressed?
- **Investigate surrounding land uses to determine whether or not the proposed site will ensure the safety and security of the students and staff.** What other buildings are in the neighborhood? What are the crime rates for the area? What types of security measures will be necessary once the building is

completed? The answers to these questions may affect your decision to build the facility in a particular area.

LAND USE CONSIDERATIONS AND WORKING WITH LOCAL GOVERNMENT

- **Knowing the city's plans for future growth and the costs of development of extending the necessary infrastructure are critical to selecting a cost-effective site.** The appropriate distance to extend infrastructure depends upon the size of the city, the rate of growth, and the city's plan for future development.
- **Consult the town or countywide comprehensive plan.** A comprehensive plan provides a long-term vision for the future of a community or region. It will be necessary to select a site that is compatible with the local or countywide comprehensive plan for future growth and development. If the proposed site or the facility plans do not fit in with the comprehensive plan, it may be difficult to obtain the necessary approvals.
- **Be sure to check local zoning ordinances to be sure that the proposed facility will be in compliance with land use regulations.** Local zoning ordinances regulate such things as allowable building types, densities, and building setbacks on a site. Although variances may be granted in some cases for projects that deviate from local zoning codes, it is wise to plan the school facility according to existing regulations from the beginning.
- **Get official backing for your plan early on.** Build a community wide school facilities improvement coalition by involving local decision-makers who will support your efforts. You may wish to develop an action plan to present to elected officials and key service organizations. Be sure to get input from stakeholders early on the process. If they feel as though they have been included in the decision-making process, they will be more willing to help.
- **Keep in mind that the annexation process may take several months.** If your district has selected a site for a new facility that is located on unincorporated land, it may take up to six months for annexation to be completed. Build this process into your expected timeline for completion and begin selecting a site early to accommodate possible delays.

OBTAINING SEWER, WATER, GAS, ELECTRICITY AND OTHER UTILITIES

- **Recognize that obtaining extension of infrastructure to the site (including sewer systems, water, and energy) may be controversial.** These public works are the basic infrastructure needed for growth and development and thus have become a hot topic of debate in local and regional planning. The concept of "sprawl" (unchecked and unplanned development) has brought the issue of where to extend these infrastructure building blocks under the microscope. Planning departments and local officials are paying closer attention to the spatial pattern of development as a result of sewer, water and energy extension.
- **Consult with the proper transportation, water, sewer, and electricity authorities early in the pre-planning process to sort out jurisdiction questions and to get cost estimates.** The Public Utilities Commission of Ohio provides online maps of Ohio utilities on a township, county and statewide level. Consult the Ohio Department of Transportation or your local authority for information on roadways and traffic considerations. In many cases, school districts geographically span jurisdictional boundaries. Be

sure to include the proper decision-makers on utilities because some coordination among agencies will be necessary.

- **Develop a contact list of people and agencies with whom you will regularly need to contact regarding utilities and other site considerations.** Be sure to include the Ohio Department of Transportation or the county or municipality that has authority over roadways, the Ohio Environmental Protection Agency, Time Warner or other cable companies, mechanical and civil engineers, landscape architects, and architectural firms. Develop a relationship with these people early on and get as much information from them as possible early on about your options.
- **Research energy-saving technologies that will save you money on utility costs in the long run.** Many districts that have built new facilities are surprised at the costs of their utilities. Make sure that you correctly estimate these costs and build them into your budget as an operating levy. They may cost more than you think. Energy-saving technologies are abundant—consult your architect for more information on how to reduce costs in this manner.
- **Contact the Ohio Water Development Authority (OWDA) for information regarding financing opportunities available for water, wastewater, solid waste and hazard waste management projects.** The OWDA is an independent agency that was created in 1968 to provide financing to local governments for drinking water, wastewater and solid waste facilities. A variety of loan programs are available to local agencies to assist in financing projects.

TRANSPORTATION ISSUES

- **Work with transportation planners to determine the impact on local transportation routes of the proposed facility.** State transportation authorities now, as a matter of course, require traffic impact studies to determine the effects of the school facility when the building will be on a state route. Local and city authorities are often requiring the same study for buildings on routes under their jurisdiction. Roadways may need to be added or widened. It is advised that districts figure these costs into the site selection. A proposed school facility site located in a low-density area will require students, parents, teachers and administrators to drive to school, thus increasing congestion on existing roadways. To keep costs low, it is important to make an effort to provide for alternative modes of transportation whenever possible. By choosing an appropriately located site, automobile dependency may be reduced, keeping costs down and minimizing local transportation impacts. It is especially important to consider impacts during peak travel periods. Be sure to contact your local transportation authorities early in the planning process to gather their input.

When a traffic impact study is done which shows the need for improvements, you are encouraged to contact the Ohio Department of Transportation to inquire if they have the resources to do the design work and prepare the plans for necessary roadway improvements. If resources are available they may also provide assistance in the bidding and award project along with inspection and final approval services.

- **Consider the costs of bussing students to school.** A facility that is located further out will impact the operating costs of transporting students to and from school. Be sure to include this in consideration of a possible site.

- **Consider vehicular access to and from the site.** For local or low volume roads, multiple entry/exit points into the site from the roadway may be recommended to provide separation of car and bus traffic. A high volume of cars at special events and during peak times may necessitate more than one entry/exit point for safe and efficient circulation to and from these roadways. On collector, arterial and higher volume roads it may be necessary to have fewer entry/exit points, but with more lanes entering and exiting the highway. Separation of car and bus traffic may be accomplished with internal driveways within the site. Site access to State and U.S. numbered highways should be designed in accordance with the latest version of the Ohio Department of Transportation’s “State Highway Access Management Manual”.
- **Remember that coordination with the Ohio Department of Transportation in terms of preliminary site plans is necessary where ODOT has jurisdiction over roadways.** Contact your district ODOT office for information early in the planning process on applying the requirements in the “State Highway Access Management Manual” to your site. In general, due to the higher volume of traffic on State and U.S. numbered routes, the number and location of entry/exit points is very critical to the safety and operations of these highways. For these reasons, Preliminary Site Plans on State and U.S. numbered routes outside city corporation limits should be coordinated with the Permits section of your local District Office of the Ohio Department of Transportation. The following URL will provide a link to ODOT’s Urban and Corridor Planning web site:
- <http://www.dot.state.oh.us/planning/FileDirectory/AccessManagement.htm>. Click on “Ohio State Highway Access Inventory” to find a list of the routes that are under ODOT jurisdiction.
- **Investigate traffic considerations.** Decide whether a traffic study may be needed to determine peak flows of traffic. You will also want to talk to the fire and police departments to determine whether the site you have selected is easily accessible for emergency situations.

- **ENVIRONMENTAL CONSIDERATIONS**

- **When selecting a site, investigate soil conditions in advance of purchasing the property.** You may find that a site is comprised of inadequate soil types that will render the site unusable. Rural districts should consult the local Soil and Water Conservation district office for more information.
- **Investigate the environmental condition of the site(s) under consideration prior to purchase.** Retain the services of an environmental engineer to provide a report that will assist you in determining the site’s viability. Conduct both a Phase I, and perhaps a Phase II Environmental Investigation of the site. A Phase I investigation is essentially a review of the records of the prior uses of the site in order to assess the potential for environmental contamination of the site by previous owners and users of the site. If contamination is suspected, it may be necessary to conduct a Phase II investigation, which includes testing for suspected contaminants. If contamination is discovered, resolve to your satisfaction issues of contribution of funds from responsible parties for remediation and timeliness. Retain the services of an environmental engineer to provide a report of remediation prior to purchase. Environmental contamination of a site can significantly impact a building program schedule.

- **OTHER ISSUES TO CONSIDER**

- **Determine early on if there are any historical or architectural design guidelines that apply to the site.** In certain areas, historical design guidelines may apply to both the construction of a building, as well as the demolition and/or renovation of any existing structures on the property. Many areas have

architectural review boards or committees that limit building setbacks, building types, and other conditions.

- **Consider sites that have adjacent positive characteristics or amenities.** Locating a new school adjacent to a library, community center, recreational facility, park or YMCA/YWCA can enhance the school environment and community use of the school.

Please refer to the Ohio School Facilities Design Manual for further details.

For more information, contact:

General Site Selection and Facilities Planning Information

National Clearinghouse for Educational Facilities
<http://www.edfacilities.org>

Ohio School Facilities Commission (614) 466-6290
<http://www.osfc.state.oh.us>

Transportation

Ohio Department of Transportation (614) 466-7170
<http://www.odot.state.oh.us>

Mid-Ohio Regional Planning Commission (614) 228-2663
<http://www.morpc.org>

Utilities

Ohio Water Development Authority (614) 466-0546
<http://www.owda.org>

Ohio's Water Professionals
<http://www.ohiowater.org>

U.S. Water News
<http://www.uswaternews.com>

Small Communities Environmental Infrastructure Group
<http://www.sceig.org>

Ohio Public Works Commission (614) 466-0880
<http://www.pwc.state.oh.us>

The Public Utilities Commission of Ohio (614) 455-3705
<http://www.puco.state.oh.us>

Other

Ohio Historic Preservation Office (Ohio Historical Society)
<http://www.ohiohistory.com>

Ohio Environmental Protection Agency
<http://www.epa.state.oh.us>