Bond Reimbursement and Grant Review Committee Meeting Agenda

April 19, 2023, Wednesday, 1:30 pm to 4:30 pm
April 20, 2023, Thursday, 8:30 am to 4:00 pm

9th Floor, Conference Room A
State Office Buildings, 333 Willoughby Avenue, Juneau, Alaska

Audio Teleconference available through free online Zoom application.
Join Online – Meeting Number: 839 6931 9566
Join by Phone – Toll Call-in number (US/Canada): 1 (253) 215-8782; Meeting: 839 6931 9566

Chair: Elwin Blackwell

Wednesday, April 19

Agenda Topics

1:30 – 1:45 PM	Committee Preparation • Call-in, Roll Call, Introductions, Chair's Opening Remarks • New Business, Additions to the Agenda • Agenda Review/Approval • Past Meeting Minutes Review/Approval
1:45 – 2:00 PM	New Member Welcome and Orientation
2:00 – 2:15 PM	Public Comment
2:15 – 3:00 PM	Department Briefing • FY2024 CIP Report ▪ Reconsideration & Final Lists • Report: School Capital Project Funding Under SB 237 • REAA and Small Municipal Fund Report • Legislative Updates
3:00 - 3:15 PM	BREAK
3:15 – 3:45 PM	Department Briefing • FY2025 CIP Application & Support Materials
3:45 - 4:30 PM	FY 2024 Application Review • FY 2025 Application • FY 2025 Application Instructions • FY 2025 CIP Eligibility and Scoring Criteria • FY 2025 Rater's Guide
4:30 PM	Recess

Thursday, April 20

Agenda Topics

8:30 – 8:45 AM	Committee Preparation • Call-in, Roll Call • Chair's Opening Remarks
8:45 – 9:00 AM	Public Comment
9:00 – 10:15 AM	FY2025 Application Review (continued) Action Item • Approve FY 2025 Application and Supporting Documents
10:15 – 10:30 AM	BREAK
10:30 – 10:45 PM	Energy Efficiency Standard ASHRAE 90.1-2016 Plug Load Requirements
10:45 – 12:00 PM	Publications • *Life Cycle Cost Analysis Handbook – Draft for Public Comment* • *Professional Services School Capital Projects Guidelines – Final* Action Item: • Approve for Public Comment: ▪ *Life Cycle Cost Analysis Handbook* • Approve ▪ *Professional Services School Capital Projects Guidelines*
12:00 – 1:15 PM	LUNCH
1:15 – 2:15 PM	Cost Model Update • 22nd Edition Model School Elements, Proposed Changes • HMS, Inc. Teleconference Action Item • Model School Escalation Elements
2:15 – 3:00 PM	Subcommittee Reports • Design Ratios • School Space
3:00 – 3:15 PM	BREAK
3:15 –3:40 PM	BR&GR Calendar and Work Plan Review & Update
3:40 – 3:45 PM	Set Date for Next Meeting
3:45 - 3:50 PM	DEED Wrap-up
3:50 – 4:00 PM	Committee Member Comments
4:00 PM	Adjourn

BOND REIMBURSEMENT & GRANT REVIEW COMMITTEE
Thursday, February 23, 2023 – 1:00 p.m. – 2:47 p.m.
Held via Videoconference
DRAFT MINUTES FOR APPROVAL

Committee Members Present	**Staff**	**Additional Participants**
Elwin Blackwell, Chair	Joe Willhoite	Larry Morris, Anchorage SD
Dale Smythe	Lori Weed	David Landis, SERRC
Randy Williams	Wayne Marquis	M. Harvey
James Estes	Wayne Norlund	
Kevin Lyon	Sharol Roys	
Branzon Anania		
Senator James Kaufman		

February 23, 2023
CALL TO ORDER and ROLL CALL

Chair Elwin Blackwell called the meeting to order at 1:02 p.m. Roll call was taken, and a quorum was established to conduct business. David Kingsland was absent. The seat for a member of the House of Representative is vacant.

AGENDA REVIEW / APPROVAL

Kevin Lyon **MOVED** to approve the agenda as presented, **SECONDED** by Dale Smythe. Hearing no objection, the motion **PASSED**.

PAST MEETING MINUTES REVIEW / APPROVAL – December 1, 2022

Dale Smythe **MOVED** to approve the minutes from December 1, 2022 as presented, **SECONDED** by Branzon Anania. Hearing no objection, the motion **PASSED**.

PUBLIC COMMENT

A public comment period was offered, and Larry Morris stated he would give public testimony another time.

FY2024 CIP APPLICATION TOTAL POINTS BALANCE REVIEW

Lori Weed reviewed the briefing paper. Because some scoring changes were made and new categories added, this paper examines allocation of the available points in the CIP application to determine if the balance of the scoring remains in line with BR&GR Committee goals. The scoring criteria are shown as traditional formula-driven versus evaluative criteria in addition to being grouped into the following categories: need, safety, costing, planning, preventive maintenance, and consideration of alternatives. About two-thirds of the points are driven by need and safety, such as space considerations, operational cost savings, and life safety conditions.

Dale Smythe commented on declining enrollment and the unhoused student point total and asked if anyone thought that more points should be available more specifically for the age of facilities rather than being based on student population. Kevin Lyon suggested that the age of buildings

that have had a major remodel be reset from the date of original construction to the date of the remodel. Lori agreed that is a hot topic and stated that a contractor is working on a database to conglomerate the renewal and replacement schedules, and the department can propose a change once that is completed.

Kevin Lyon thought the paper showed a good scoring balance other than that one concern. Branzon Anania said that the fire marshal's definition of life and safety is sometimes not in line with the department's but said it's possible he was missing something in the scoring. Lori and he will examine that score category before the April meeting.

Randy Williams thought the unhoused student scoring was appropriate: if there are fewer unhoused student situations in the future, it should be a self-correcting issue. Dale replied that there was a time when unhoused students was the highest issue and had higher scores to avoid overcrowded schools. He noted that is not the current situation, so maybe the scoring should be adjusted to match the current situation of older schools rather than overcrowded ones.

Joe Willhoite asked if Dale had any examples of this situation or if it is anecdotal. Dale replied he could get some examples, he discovered that there are many more old schools than he thought. Some of the smaller districts have many outdated buildings that are getting more difficult to maintain. He added that, concerning Branzon's comments about the fire sprinkler situation, perhaps a list should be started because there are schools that should be sprinklered that are not. Kevin Lyon agreed that there are schools that are overcrowded, not sprinklered, and outdated.

Lori Weed agreed that the unhoused student situation is self-correcting to some extent. She asked whether unhoused student projects need to rise to the top of the list, or should they be more competitive with just a general bad building? She noted that regular renovations fall into major maintenance versus the school construction list for adding space and other life safety and instructional program improvements.

Dale Smythe noted that the risk to the state for cost is more in older facilities since they may not have the option for energy efficiency upgrades because of condition or age of equipment, and that might be a higher risk than overcrowding.

Dale asked how much relative scoring was related to unhoused students this last season. Lori said only a handful of projects get unhoused points, and there are about five projects on the construction list that are adding space. Dale would like to see further examination of this subject to see if there is a need to change the current scoring for next year's application.

Joe Willhoite mentioned that the comments to him about conditions of schools have centered on the age and the condition of the facilities, not on overcrowding.

Randy Williams said that he would support an adjustment to the point spread if it was warranted, but if there are fewer points being sought for unhoused students, it should self-correct.

Lori Weed continued the briefing paper review, with the breakout by typical project achievement:

- basic scoring elements that every project should be able to achieve,

- scoring elements that are designed to weigh projects of disparate scopes and needs, and
- scoring elements for targeted priority increases (bumps).

Lori then reviewed and commented the section entitled "By the Numbers" that shows the breadth of points used within categories such as life safety, cost estimate, operating cost savings, options, type of space, and inadequacy of space.

Senator Kaufman asked where he could find out more about the scoring process, and Lori directed him to the Facilities' CIP Application and Support webpage, which not only gives a brief overview, but also provides links to the application, the instructions, the rater's guide, and all the documents and tools to support the process.

Lori discussed the concern of how much bias the CIP application scoring has toward projects that are complete and seeking reimbursement through the grant process versus projects that are in the planning stages. She said that the application planning and design scoring category was limited to design development stage and since the FY2017 application the design development score had been capped at 5 points; and Kevin Lyon said that it is capped to avoid getting more done in the design phase and then not getting a pathway to finish the job.

Lori stated that in the last couple of years, about half of the projects that reached the top 10 were completed.

Elwin Blackwell asked if there were questions other than the problem of aging schools that may need to be replaced even though they do not have an unhoused situation because the student population is decreasing. He agreed that is a subject to review at some point.

Randy Williams asked if "in progress" projects in the table meant those are in construction. Lori responded that the Nome roof, Bethel campus fire pump house, and Nuniwaarmiut wastewater upgrades are still in design. Kevin Lyon said the Homer roof is in construction.

David Landis appreciated the discussion about the spread of the scoring and how that highlights what the funding levels should be.

SUBCOMMITTEE REPORTS

Design Ratios

Dale Smythe reported that at its last meeting, the subcommittee determined that the design ratios were ready for public comment, and if the committee agrees, then they need to decide what questions to put in the public memo. One thing Dale wants input on is the clarity of the definitions. Kevin Lyon said he liked the example of consideration of daylighting elements.

Wayne Norlund asked if the V:GSF ratio might be listed in reverse and should be GSF:V instead. That would be consistent with the way the other ratios pan out with the percentages.

Lori questioned the timeline for the public comment, committee review, and cover memo approval. Dale would like to see public comment as soon as possible with subcommittee review of the cover memo. That way, the committee can review public comment at the April meeting.

Dale Smythe **MOVED** that the design ratios be put out for public comment after some minor edits by the department and subcommittee concerning the inverted ratio of volume to gross square footage and then recommending comments for daylighting, definitions, and other specifics that may come from the BR&GR Committee or the subcommittee to be included in the cover memo, **SECONDED** by Kevin Lyon. Hearing no objections, the motion **PASSED**.

School Space
Dale Smythe reported that the subcommittee had made progress around the limits of defining the measurement of gross square footage considering climate zone requirements and wall thickness.

The subcommittee will propose removing the K-12 space formula and focusing on elementary and high school formulas and the variances that might apply to those schools depending on location, water and wastewater treatment needs, and mechanical or storage related elements.

PUBLICATIONS: PROFESSIONAL SERVICES FOR SCHOOL CAPITAL PROJECTS
Wayne Norlund directed the committee to review the new section regarding commissioning agents and to an added description of the value analysis process. He asked if these sections sufficiently addressed the expectations of the committee and if they were placed logically in the publication or if they would be better suited for another publication.

Randy Williams appreciated the effort, said it was really great, and thought it was ready to go out to public comment. Kevin Lyon agreed with Randy.

Dale Smythe asked if the value analysis was mentioned only in the schematic design services or if it appeared anywhere else in the publication. Wayne responded that it was primarily in that one area, and Dale then said he thought it was ready for public comment. Dale asked if the value analysis is described in any other publication, and Wayne responded that it is in the *Capital Project Administration Handbook* showing all four levels of value analysis and the deliverables expected at each level.

Joe Willhoite questioned the placement of the information and asked if it might be better in one document. Randy Williams said it is clearly intended to be part of schematic design services, and it also directs the user right to the *Capital Project Administration Handbook*. Kevin Lyon added that when on a project, both books are on the project manager's desk and are used regularly.

Randy Williams **MOVED** that the BR&GR Committee recommend the department amend the draft publication update of the Professional Services for School Capital Projects as shown in the packet and then open a period of public comment, **SECONDED** by Branzon Anania. Hearing no objections, the motion **PASSED**.

MEMBER RECRUITMENT
Elwin Blackwell explained that there was a recruitment for three seats that will be vacant shortly.

Lori Weed thanked David Kingsland, the outgoing public member, and announced that he will be replaced by Douglas Hayman, a K-12 public educator from the Kenai area. She thanked Jim

Estes for his service and said he will be missed by the committee. He will be replaced by Larry Morris, Jr., who has a background in both Fairbanks and Anchorage. Randy Williams' term is expiring, but he reapplied for reappointment, and that was granted.

Elwin Blackwell thanked Jim Estes and David Kingsland for their service and said it had been a pleasure having them on the committee the last four years. Joe Willhoite said he appreciated all the applications and encouraged everyone to stay involved. He thanked David Landis for joining in the meeting today. Elwin Blackwell stated that public input is always valuable and has been very helpful over the years.

BR&GR WORK PLAN REVIEW & UPDATE

Lori Weed reviewed both the annual work topics list and the master list. There have been no changes to the current list since the last meeting. Kevin Lyon asked if there would be any input or materials for the Cost Model at the April meeting since the due date is scheduled for May. Lori said there would be a short presentation at the April meeting with feedback from the committee, and then the final version would be available the first week in May.

She has not moved anything from the master plan to the current year, but some of the items in section 5, space issues, Rater's Guide matrices, and weighting factors will probably be brought up for next year. Randy Williams asked about the life cycle cost analysis publication, and Lori said a draft would be introduced in April. Randy noted that swimming pools and educational specifications were scheduled for 2024, but he asked about the items marked TBD. Lori replied that some of those need to be reviewed to see if they are still relevant.

SET NEXT MEETING DATE

Lori Weed suggested the next meeting date be April 19th and 20th in Juneau so as not to conflict with the ALASBO maintenance training scheduled for April 13 – 14. Elwin Blackwell is available on the suggested dates but might not be chairing the meeting if a new division director is appointed; he will be retiring soon after 30 years with the department. Lori said the April meeting is usually a day-and-a-half, but with a light agenda it might just be a one-day meeting.

COMMITTEE MEMBER COMMENTS

Elwin Blackwell said it was a pleasure having Senator Kaufman at the meeting today and thanked him for attending.

Dale Smythe said he would miss seeing Jim in April in Juneau and thanked him for serving with the board. He congratulated Elwin on his retirement and welcomed the new members.

James Estes said it had been a pleasure and a privilege to be a part of this committee and thanked everyone for the opportunity.

ADJOURN

Randy Williams **MOVED** to adjourn the meeting, **SECONDED** by Dale Smythe. Hearing no objections, the motion **PASSED**, and the meeting adjourned at 2:47 p.m.

Bond Reimbursement & Grant Review Committee
New Member Welcome

Member Appointments

Members with new appointments as of March 1, 2023:

Randy Williams, Professional Degrees & Experience in School Construction

Larry Morris, Jr., Experience in Urban or Rural School Facilities Management

Douglas Hayman, Public Representative

Committee Duties

Committee duties established in AS 14.11.014(b):

(1) review the department's priorities among projects for which school construction grants are requested;

(2) make recommendations to the board concerning school construction grants and make recommendations to the commissioner concerning projects for which bond reimbursement is requested;

(3) develop criteria for construction of schools in the state; criteria developed under this paragraph must include requirements intended to achieve cost-effective school construction;

(4) analyze existing prototypical designs for school construction projects;

(5) establish a form for grant applications;

(6) establish a method of ranking grant projects;

(7) recommend to the board necessary changes to the approval process for school construction grants and for projects for which bond reimbursement is requested;

(8) set standards for energy efficiency for school construction and major maintenance to provide energy efficiency benefits for all school locations in the state and that address energy efficiency in design and energy systems that minimize long-term energy and operating costs.

Subcommittees

Focused efforts that require additional work outside of the full committee are utilized for specific topics. Currently two subcommittees are active:

Design Ratios Subcommittee with a mission Under AS 14.11.014(b)(3), evaluate and propose construction design ratio guidelines for use by the department, school districts, and the design community to design new and renovated school facilities to reduce first cost (construction) and long-term cost (operation).

School Space Subcommittee with a mission to review accuracy and adequacy issues relative to the state's space allocation guidelines and recommend updates that support the board of education's mission and vision for Alaska public education.

Meetings

The committee traditionally meets in April and December. Extra work session meetings have occurred as needed for special projects throughout the remainder of the year. Tentative future meetings dates may be set at the end of a committee meeting.

Meeting agendas are developed by Facilities staff in consultation with the chair based on the committee work plan. Additional agenda items may be proposed by committee members.

The committee generally functions at a fairly informal level unless specific action is needed to approve an item. When specific action is needed, such as approval of a publication or CIP application element, motions are made and may be approved by either a roll-call vote or by unanimous consent. Any member may make such a motion at any time.

General form of a motion: "I move that the Committee [state desired action (recommend / approve / adopt / disapprove)] [insert topic of motion]."

Committee Action Flow:

1. Presentation of topic for committee action
2. Committee questions and discussion
3. Call for a motion / declaration of a motion
4. Motion seconded
5. Committee discussion on the specific motion
6. Amendment(s) if any to the motion
7. Call for vote of members present or adoption by unanimous consent

Bond Reimbursement and Grant Review Committee

As of: March 1, 2023

Member	Appointed	Re-appointed	Term Expires
Elwin Blackwell — Chair Commissioner or Commissioner's Designee	Commissioner's Designee	--	--
Representative Dan Ortiz House of Representatives Member	Appointed by Speaker	--	--
Senator James Kaufman Senate Member	Appointed by President	--	--
Randy Williams Professional Degrees & Experience in School Construction	03/01/2019	03/01/2023	02/28/2027
Dale Smythe Professional Degrees & Experience in School Construction	03/01/2017	03/01/2021	02/28/2025
Larry Morris Experience in Urban or Rural School Facilities Management	03/01/2023	n/a	02/28/2027
Kevin Lyon Experience in Urban or Rural School Facilities Management	03/01/2021	n/a	02/28/2025
Douglas Hayman Public Representative	03/01/2023	n/a	02/28/2027
Branzon Anania Public Representative	03/01/2021	n/a	02/28/2025

Members appointed by commissioner unless noted. See AS 14.11.014 and 4 AAC 31.087.

THE STATE of ALASKA
GOVERNOR MIKE DUNLEAVY

Department of Education & Early Development
FINANCE & SUPPORT SERVICES
PO Box 110500
Juneau, Alaska 99811-0500
Telephone: 907.465.6906

To: Bond Reimbursement & Grant Review Committee
From: School Facilities
Date: April 19, 2023

DEPARTMENT BRIEFING

FY 2024 CIP Report

The department received reconsideration requests from three districts on five projects. In the lists issued December 16, 2022, the department reconsidered its determination on these projects and adjusted the budget of one project.

The department received one appeal that was received within the statutory deadline. The department adjusted the budget of the appealed project and the final lists were issued February 2, 2023. The final lists are included in the packet. These were approved by the State Board of Education meeting on March 16, 2023.

The major maintenance list contains a total of 97 projects amounting to a total state share request of $217,866,788, and the school construction list contains 17 projects with a state share request of $195,666,783.

An updated sheet on the CIP grant request and funding history FY13-FY24 is included for reference.

Preventive Maintenance Update (PM State-of-the-State)

The Preventive Maintenance State of the State Report was updated on August 15, 2022, and is included in the packet. For the current FY 2024 CIP cycle, 48 of 53 school districts have certified preventive maintenance programs.

Districts not currently certified include:

- Aleutian Region
- Chatham
- Hydaburg City
- Lake & Peninsula Borough
- Skagway Borough

Districts granted provisional certification and working with the department to develop a full year of evidence of plan adherence include:

- Alaska Gateway
- Bristol Bay Borough
- Craig City
- Kake City
- Klawock City
- Nenana City
- Yakutat Borough
- Yukon Flats

Problem areas continue to be maintenance management, tracking and reporting energy consumption, and maintaining maintenance and custodial personnel training plans and records.

In-person site visits for current cycle took place between November and April for the following school districts:

- Anchorage
- Chugach
- Fairbanks Borough
- Galena City
- Kenai Peninsula Borough
- North Slope Borough *(pending)*
- Pelican City
- Tanana City
- Valdez City *(pending)*

The preliminary certification report for the FY 2025 CIP cycle will be issued by June 1. Districts not in compliance have until August 1 to submit documentation of compliance. The final PM state-of-the-state report will be issued by August 15.

School Capital Project Funding Report

AS 14.11.035 requires, beginning in February 2013, an annual report on school construction and major maintenance funding. The statute requires reports of spending from each of the three funding programs providing state aid for capital improvement projects—school construction and major maintenance fund grants under AS 14.11.011, regional education attendance area and small municipal school district school fund (REAA Fund) allocations under AS 14.11.025, and school construction debt reimbursement under AS 14.11.100. Summary tables from the 2023 report showing the funding activity by program, fiscal year, and category are included in the packet. The final report is available on the department's website.

REAA & Small Municipality Fund Report

The Regional Education Attendance Area School Fund was established by chapter 93, SLA 2010 (SB 237). The amount of money available each fiscal year is tied to the annual debt service incurred under AS 14.11.100. In 2013, the fund was amended to include "small municipal school districts". In 2018, the fund was amended to allow funding of major maintenance grants but to maintain the primary function of funding school construction projects. Since the first appropriation in FY 2013, $414,513,378 has been deposited into the REAA Fund. From FY13 through FY15, $869,528 in interest also accrued to the fund for a total of $415,382,906. A total of 23 projects have obligated $392,429,463.

The combined projected FY24 REAA Fund appropriation and unobligated fund balance is anticipated to be approximately $50,850,443. If appropriated, this funding is not sufficient to provide the state share of $55,336,914 for the priority #1 project on the School Construction Grant Fund list, Newtok Relocation/Replacement K-12 School, Mertarvik

Legislative Action

The Governor introduced the FY2024 budget bills for the First Session of the 33rd Legislature. The operating budget (HB 39/SB 40) as introduced provides for an allocation of $67,168,161 for state aid for costs of school construction under AS 14.11.100 (debt reimbursement) and $27,897,000 to the REAA Fund. These amounts are the full reimbursement entitlement and fund calculation for FY2024. HB 39 was being considered by the House on April 10; once passed it moves to the Senate Finance Committee. The capital budget introduced (HB 40/SB 41) does not include funding for either the School Construction Grant Fund or the Major Maintenance Grant Fund. The capital budget bills are in the respective Finance Committees.

SB 113 by the Senate Finance Committee proposes to amend AS 14.11.025(a) to include Mt Edgecumbe High School projects and projects for teacher housing supporting regional educational

attendance areas and small municipalities as eligible project scope for REAA Fund allocations. It also would remove the $70 million cap on the unobligated fund balance.

Cost Model Update

A proposal request is issued to HMS, Inc. at the end of December, annually, for an update to the *DEED Program Demand Cost Model for Alaskan Schools*. This will be the 22nd Edition. As part of this edition the geographic area cost factors will be updated (Instructions to the Cost Model Table 1). The geographic area cost factors were last updated in 2018, when a matrix to evaluate the individual cost factors was developed. In this cycle, we will also be working to further conform the cost model to the *Alaska School Design & Construction Standards Handbook*, adopted by the Committee as part of the FY2024 CIP application.

For the 22nd Edition, we continue to see the Committee as handling the review of the *Escalation Model School* file as in the past four years. This file includes not only price increases for labor and materials but also changes to school systems and components. The Committee has established a solid track record on vetting any adjustments of this type to the Escalation Model School. This work will dovetail with the standards conformance work mentioned in the earlier paragraph.

Department Projects

Capital Needs Forecast Database Tool

The department continues to work with Inzata Analytics to develop a Capital Needs Forecast Database tool to establish a data-driven statewide need for capital renewal and new construction on an annual basis and provide a dashboard to align funding programs with that need. This approx. $200,000 investment was funded by the legislature in FY2022. The method for updating the base need information – renewal and replacement schedule data – may allow a change in the department collection of the data and provide a platform for using the system renewal data in future CIP application cycles in lieu of building average age.

ASHRAE 90.1 Compliance Checklist

The department was approached by Lawrence Berkley National Laboratory (LBL) and Pacific Northwest National Laboratory (PNNL) to provide assistance through use of the US Department of Energy's Efficient and Healthy Schools Campaign to improve the energy efficiency and air quality in schools. After discussions, a decision was made to review the Alaska-specific ASHRAE 90.1-2016 compliance checklist, make revisions as needed, and have the LBL and PNNL team create user training materials to assist districts and other stakeholders in the use of the tool. This work is ongoing with an anticipated completion in the fall.

Publications Update

Following is a list of publications currently managed by the department along with an estimated revision priority and the year of publication. Those in bold are publications proposed for committee approval.

1. Professional Services for School Capital Projects (2018) *[Proposed update 2023]*
2. **Life Cycle Cost Analysis Handbook** (2018) *[Proposed Update 2023]*
3. **School Design and Construction Standards Handbook** (2022) *[Proposed Update 2024]*
4. Renewal & Replacement Schedule (2001) *[Proposed Update 2024]*
5. **A Handbook to Writing Educational Specifications** (2019)
6. **Swimming Pool Guidelines** (2019)

7. **Space Guidelines Handbook** (1996)
8. Facility Appraisal Guide (1997)
9. Outdoor Facility Guidelines for Secondary Schools (new)
10. **Guide for School Facility Condition Surveys** (2020)
11. Cost Format – *EED Standard Construction Cost Estimate Format* (2020)
12. Site Selection Criteria & Evaluation Handbook (2021)
13. **Guidelines for School Equipment Purchases** (2022)
14. Capital Project Administration Handbook (2022)
15. **Project Delivery Method Handbook (2022)**
16. **Alaska School Facilities Preventive Maintenance Handbook** (2022)

Professional Services for School Capital Projects
Included in the packet is a proposed final draft of the *Professional Services for School Capital Projects.* Public comment closed April 3. See separate agenda item.

Life Cycle Cost Analysis Handbook
Included in the packet is a proposed initial draft of the *Life Cycle Cost Analysis Handbook* to go out for public comment. See separate agenda item.

Department Staffing Update

Lori Weed will be leaving Facilities as a School Finance Specialist at the end of this meeting after almost a decade of service and taking a new position in the department as the School Finance Manager.

Alaska Department of Education and Early Development
FY2024 Capital Improvement Projects
School Construction Grant Fund

Final List

Feb 2 Rank	Dec 21 Rank	Nov 5 Rank	School District	Project Name	Amount Requested	Eligible Amount	Prior Funding	DEED Recommended Amount	Participating Share	State Share	Aggregate Amount
1	1	1	Lower Kuskokwim	Newtok Relocation/Replacement K-12 School, Mertarvik	$57,525,549	$81,466,239	$25,000,000	$56,466,239	$1,129,325	$55,336,914	$55,336,914
2	2	2	Lower Kuskokwim	Anna Tobeluk Memorial K-12 School Renovation/Addition, Nunapitchuk	$50,578,614	$46,616,611	$0	$46,616,611	$932,332	$45,684,279	$101,021,193
3	3	3	Northwest Arctic Borough	Deering K-12 School Renovation/Addition	$41,177,097	$34,544,603	$0	$34,544,603	$6,908,921	$27,635,682	$128,656,875
4	4	4	Anchorage	Homestead Elementary School Safety Improvements	$5,369,344	$5,369,344	$0	$5,369,344	$1,879,270	$3,490,074	$132,146,949
5	5	5	Bering Strait	Brevig Mission K-12 School Addition	$31,768,032	$29,361,625	$0	$29,361,625	$587,232	$28,774,393	$160,921,342
6	6	6	Hoonah City	Hoonah School Playground Improvements	$227,747	$227,747	$0	$227,747	$79,711	$148,036	$161,069,378
7	7	7	Ketchikan Borough	Valley Park Complex Upgrades	$336,403	$207,986	$0	$207,986	$72,795	$135,191	$161,204,569
8	8	8	Anchorage	Secure Vestibules, Group 3, 5 Sites	$9,036,461	$9,036,461	$0	$9,036,461	$3,162,761	$5,873,700	$167,078,269
9	9	9	Anchorage	Secure Vestibules, Group 2, 3 Sites	$881,235	$816,985	$0	$816,985	$285,945	$531,040	$167,609,309
10	10	10	Lower Kuskokwim	Water Storage and Treatment, Kongiganak	$8,286,027	$4,069,731	$0	$4,069,731	$81,395	$3,988,336	$171,597,645
11	11	11	Anchorage	Secure Vestibules, Group 1, 3 Sites	$1,085,084	$1,085,084	$0	$1,085,084	$379,779	$705,305	$172,302,950
12	12	12	Ketchikan Borough	Playground Equipment and Surface Upgrades, 3 Sites	$439,846	$405,655	$0	$405,655	$141,979	$263,676	$172,566,626
13	13	13	Kenai Peninsula Borough	Kenai Middle School Security Remodel	$1,753,359	$1,753,359	$0	$1,753,359	$613,676	$1,139,683	$173,706,309
14	14	14	Mat-Su Borough	Mat-Su Central Replacement Facility	$24,230,364	$24,230,364	$0	$24,230,364	$8,480,627	$15,749,737	$189,456,046
15	15	15	Mat-Su Borough	District Athletic Field Upgrades	$10,088,661	$7,773,555	$0	$7,773,555	$2,720,744	$5,052,811	$194,508,857
16	16	16	Fairbanks Borough	University Park Elementary Site Improvements	$2,002,757	$1,156,684	$0	$1,156,684	$404,839	$751,845	$195,260,702
17	17	17	Fairbanks Borough	West Valley High School Auditorium Upgrade	$1,209,046	$624,740	$0	$624,740	$218,659	$406,081	$195,666,783
Totals Totals Totals see column D-I				**Totals:**	**$245,995,626**	**$248,746,773**	**$25,000,000**	**$223,746,773**	**$28,079,990**	**$195,666,783**	nd of workbook

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Feb 2 Rank	Dec 21 Rank	Nov 5 Rank	School District	Project Name	Amount Requested	Eligible Amount	Prior Funding	DEED Recommended Amount	Participating Share	State Share	Aggregate Amount
1	1	1	Yukon-Koyukuk	Rampart K-12 School Renewal	$9,142,300	$8,900,815	$0	$8,900,815	$178,016	$8,722,799	$8,722,799
2	2	2	Bristol Bay Borough	Bristol Bay School Renovations, Phase 2 Supplemental	$2,774,730	$2,774,730	$0	$2,774,730	$971,155	$1,803,575	$10,526,374
3	3	3	Iditarod Area	Blackwell K-12 School Renovations, Anvik	$6,165,943	$5,107,092	$0	$5,107,092	$102,142	$5,004,950	$15,531,324
4	4	4	Lower Kuskokwim	Nuniwaarmiut K-12 School Wastewater Upgrades, Mekoryuk Supplemental	$834,508	$834,508	$0	$834,508	$16,690	$817,818	$16,349,142
5	5	5	Anchorage	Orion Elementary School Roof Replacement	$4,949,761	$4,949,761	$0	$4,949,761	$1,732,416	$3,217,345	$19,566,487
6	6	6	Kenai Peninsula Borough	Homer High School Partial Roof Replacement	$3,459,625	$2,945,029	$0	$2,945,029	$1,030,760	$1,914,269	$21,480,756
7	7	7	Anchorage	Government Hill Elementary School Roof Replacement	$2,635,154	$2,635,154	$0	$2,635,154	$922,304	$1,712,850	$23,193,606
8	8	8	Lower Kuskokwim	Bethel Campus Fire Pump House and Fire Protection Upgrades Supplemental	$252,526	$252,526	$0	$252,526	$5,051	$247,475	$23,441,081
9	9	9	Nome City	Nome Beltz Jr/Sr High School Roof Replacement Supplemental	$5,672,472	$5,672,472	$0	$5,672,472	$1,701,742	$3,970,730	$27,411,811
10	10	10	Lower Yukon	Hooper Bay K-12 School Exterior Repairs	$2,296,607	$2,296,607	$0	$2,296,607	$45,932	$2,250,675	$29,662,486
11	11	11	Anchorage	Stellar Secondary School Fire Alarm	$397,170	$389,096	$0	$389,096	$136,184	$252,912	$29,915,398
12	12	12	Anchorage	Birchwood Elementary School Boiler	$2,076,786	$2,076,786	$0	$2,076,786	$726,875	$1,349,911	$31,265,309
13	13	13	Nenana City	Nenana School Flooring and Asbestos	$516,633	$516,633	$0	$516,633	$25,832	$490,801	$31,756,110
14	14	14	Anchorage	Mears Middle School Roof Replacement	$7,081,039	$6,403,930	$0	$6,403,930	$2,241,375	$4,162,555	$35,918,665
15	15	24	Kuspuk	Jack Egnaty Sr. K-12 School Roof Replacement, Sleetmute	$742,538	$1,513,970	$0	$1,513,970	$30,279	$1,483,691	$37,402,356
16	16	15	Denali Borough	Tri-Valley School Partial Roof Replacement	$2,103,851	$2,103,851	$0	$2,103,851	$420,770	$1,683,081	$39,085,437
17	17	16	Kake City	Exterior Upgrades - Main School Facilities	$331,134	$331,134	$0	$331,134	$66,227	$264,907	$39,350,344
18	18	17	Nome City	Nome Beltz Jr/Sr High School Generator Replacement	$948,937	$948,937	$0	$948,937	$284,681	$664,256	$40,014,600
19	19	18	Lower Kuskokwim	Qugcuun Memorial K-12 School Renovation, Oscarville	$4,471,558	$4,471,558	$0	$4,471,558	$89,431	$4,382,127	$44,396,727
20	20	19	Valdez City	Districtwide Generator Replacement	$1,146,505	$1,146,505	$0	$1,146,505	$401,277	$745,228	$45,141,955
21	21	20	Ketchikan Borough	Ketchikan High School Security Upgrades	$599,984	$457,087	$0	$457,087	$159,980	$297,107	$45,439,062
22	22	21	Anchorage	Homestead Elementary School Roof Replacement	$3,515,805	$3,515,805	$0	$3,515,805	$1,230,532	$2,285,273	$47,724,335
23	23	22	Anchorage	King Tech High School Roof Replacement	$3,829,327	$3,829,327	$0	$3,829,327	$1,340,264	$2,489,063	$50,213,398
24	24	23	Anchorage	East High School Gym Improvements	$8,726,669	$8,726,669	$0	$8,726,669	$3,054,334	$5,672,335	$55,885,733
25	25	25	Nenana City	Nenana School Boiler Replacement	$209,352	$194,697	$0	$194,697	$9,735	$184,962	$56,070,695
26	26	26	Lower Yukon	Marshall K-12 School Emergency Tank Farm Repair	$1,809,501	$1,809,501	$0	$1,809,501	$36,190	$1,773,311	$57,844,006
27	27	27	Aleutians East Borough	Sand Point K-12 School Pool Major Maintenance	$102,608	$102,608	$0	$102,608	$35,913	$66,695	$57,910,701
28	28	28	Anchorage	North Star Elementary School Roof Replacement	$3,003,681	$3,003,681	$0	$3,003,681	$1,051,288	$1,952,393	$59,863,094
29	29	29	Anchorage	Service High School Health and Safety Improvements	$5,462,781	$5,462,781	$0	$5,462,781	$1,911,973	$3,550,808	$63,413,902

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30	30	30	Haines Borough	Haines High School Roof Replacement	$2,051,991	$1,876,677	$0	$1,876,677	$656,837	$1,219,840	$64,633,742
31	31	31	Lower Kuskokwim	Gladys Jung Elementary School Heating Mains Replacement	$1,188,713	$1,188,713	$0	$1,188,713	$23,774	$1,164,939	$65,798,681
32	32	32	Anchorage	O'Malley Elementary School Renovation	$3,693,410	$3,693,410	$0	$3,693,410	$1,292,693	$2,400,717	$68,199,398
33	33	33	Northwest Arctic Borough	June Nelson Elementary School Partial Roof Replacement	$1,751,514	$1,751,514	$0	$1,751,514	$350,303	$1,401,211	$69,600,609
34	34	34	Valdez City	Hermon Hutchens Elementary School Partial Flooring Replacement	$419,222	$419,222	$0	$419,222	$146,728	$272,494	$69,873,103
35	35	35	Lower Kuskokwim	Akula Elitnauvik K-12 School Renovation, Kasigluk-Akula	$4,975,460	$4,975,460	$0	$4,975,460	$99,509	$4,875,951	$74,749,054
36	36	36	Denali Borough	Districtwide Electrical Code Upgrades	$1,291,535	$1,291,535	$0	$1,291,535	$258,307	$1,033,228	$75,782,282
37	37	37	Anchorage	Bear Valley Elementary School Domestic Water Replacement	$2,666,958	$2,665,758	$0	$2,665,758	$933,015	$1,732,743	$77,515,025
38	38	38	Anchorage	Abbott Loop Elementary School Fire Sprinklers	$2,544,565	$2,313,143	$0	$2,313,143	$809,600	$1,503,543	$79,018,568
39	39	39	Haines Borough	Haines High School Locker Room Renovation	$1,371,179	$1,371,179	$0	$1,371,179	$479,913	$891,266	$79,909,834
40	40	40	Hoonah City	Hoonah Central Boiler Replacement	$340,053	$340,053	$0	$340,053	$119,019	$221,034	$80,130,868
41	41	41	Nome City	Nome Elementary School Fire Alarm Replacement	$529,683	$529,683	$0	$529,683	$158,905	$370,778	$80,501,646
42	42	42	Yupiit	Mechanical System Improvements, 3 Schools	$4,734,985	$652,506	$0	$652,506	$13,050	$639,456	$81,141,102
43	43	43	Denali Borough	Tri-Valley School Septic System Upgrades	$515,692	$515,692	$0	$515,692	$103,138	$412,554	$81,553,656
44	44	44	Alaska Gateway	Tetlin K-12 School Renovation	$2,312,145	$1,951,150	$0	$1,951,150	$39,023	$1,912,127	$83,465,783
45	45	45	Lower Yukon	Hooper Bay K-12 School Emergency Lighting and Retrofit	$234,545	$234,545	$0	$234,545	$4,691	$229,854	$83,695,637
46	46	46	Alaska Gateway	Tok K-12 School Partial Roof Replacement	$512,791	$512,791	$0	$512,791	$10,256	$502,535	$84,198,172
47	47	47	Northwest Arctic Borough	Davis-Ramoth K-12 School Rehabilitation, Selawik	$10,312,923	$10,312,923	$0	$10,312,923	$2,062,585	$8,250,338	$92,448,510
48	48	48	Kodiak Island Borough	Main Elementary School Roof Replacement	$1,369,078	$1,369,078	$0	$1,369,078	$479,177	$889,901	$93,338,411
49	49	49	Alaska Gateway	Northway K-12 School Mechanical Renovation	$1,195,524	$1,195,524	$0	$1,195,524	$23,910	$1,171,614	$94,510,025
50	50	50	Southeast Island	Thorne Bay K-12 School Fire Suppression System	$638,360	$638,360	$0	$638,360	$12,767	$625,593	$95,135,618
51	51	51	Lower Yukon	Scammon Bay K-12 School Emergency Lighting and Retrofit	$119,467	$119,467	$0	$119,467	$2,389	$117,078	$95,252,696
52	52	52	Yupiit	Tuluksak K-12 School Generator Replacement	$597,214	$152,002	$0	$152,002	$3,040	$148,962	$95,401,658
53	53	53	Yukon-Koyukuk	Roof Replacement, 3 Schools	$2,114,243	$1,997,707	$0	$1,997,707	$39,954	$1,957,753	$97,359,411
54	54	54	Lower Yukon	Scammon Bay K-12 School Exterior Upgrades	$663,922	$663,922	$0	$663,922	$13,278	$650,644	$98,010,055
55	55	55	Southwest Region	Twin Hills K-12 School Renovation	$7,631,386	$6,342,575	$0	$6,342,575	$126,851	$6,215,724	$104,225,779
56	56	56	Kodiak Island Borough	Chiniak K-12 School Water Code Compliance and Upgrade	$434,124	$147,968	$0	$147,968	$51,789	$96,179	$104,321,958
57	57	57	Lower Kuskokwim	Bethel Regional High School Boardwalk Replacement	$2,562,064	$1,308,239	$0	$1,308,239	$26,165	$1,282,074	$105,604,032
58	58	58	Fairbanks Borough	Administrative Center Exterior Renovation	$5,505,076	$2,529,356	$0	$2,529,356	$885,275	$1,644,081	$107,248,113

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59	59	59	Southeast Island	Thorne Bay K-12 School Mechanical Control Upgrades	$1,404,113	$1,404,113	$0	$1,404,113	$28,082	$1,376,031	$108,624,144
60	60	60	Southeast Island	Thorne Bay K-12 School Flooring Replacement	$71,549	$71,549	$0	$71,549	$1,431	$70,118	$108,694,262
61	61	61	Sitka Borough	Keet Gooshi Heen Elementary Covered PE Structure Renovation	$643,966	$643,966	$0	$643,966	$225,388	$418,578	$109,112,840
62	62	62	Denali Borough	Generator Replacement, 3 Schools	$2,501,045	$2,501,045	$0	$2,501,045	$500,209	$2,000,836	$111,113,676
63	63	63	Fairbanks Borough	North Pole High School Renovation	$7,056,943	$6,107,614	$0	$6,107,614	$2,137,665	$3,969,949	$115,083,625
64	64	64	Iditarod Area	David-Louis Memorial K-12 School Roof Replacement, Grayling	$3,440,804	$3,440,804	$0	$3,440,804	$68,816	$3,371,988	$118,455,613
65	65	65	Kake City	Kake High School Flooring Replacement	$727,285	$727,285	$0	$727,285	$145,457	$581,828	$119,037,441
66	66	66	Nome City	Nome Beltz Jr/Sr High and Nome Elementary Schools Secure Access and ADA Improvements	$342,551	$342,551	$0	$342,551	$102,765	$239,786	$119,277,227
67	67	67	Nenana City	Nenana School Fire Suppression System Replacement	$1,334,313	$1,334,313	$0	$1,334,313	$66,716	$1,267,597	$120,544,824
68	68	68	Saint Marys City	St. Mary's Campus Renewal and Repairs	$1,440,629	$992,463	$0	$992,463	$99,246	$893,217	$121,438,041
69	69	69	Fairbanks Borough	Arctic Light Elementary School Exterior Renovation	$8,405,365	$7,547,890	$0	$7,547,890	$2,641,761	$4,906,129	$126,344,170
70	70	70	Lower Kuskokwim	Akiuk Memorial K-12 School Renovation, Kasigluk-Akiuk	$3,604,231	$3,604,231	$0	$3,604,231	$72,085	$3,532,146	$129,876,316
71	71	71	Southeast Island	Port Alexander K-12 School Domestic Water Pipe Replacement	$279,133	$162,572	$0	$162,572	$3,251	$159,321	$130,035,637
72	72	72	Southwest Region	Ekwok K-12 School Renovation	$9,513,926	$7,999,176	$0	$7,999,176	$159,984	$7,839,192	$137,874,829
73	73	73	Kenai Peninsula Borough	West Homer Elementary School North Wall Improvement	$595,308	$490,082	$0	$490,082	$171,529	$318,553	$138,193,382
74	74	74	Yupiit	Tuluksak K-12 School Fuel Tank Replacement	$4,664,317	$4,664,317	$0	$4,664,317	$93,286	$4,571,031	$142,764,413
75	75	75	Kake City	Kake High School Plumbing Replacement	$1,047,345	$1,047,345	$0	$1,047,345	$209,469	$837,876	$143,602,289
76	76	76	Ketchikan Borough	Houghtaling Elementary School Transformer Replacement	$61,798	$577,027	$0	$577,027	$201,959	$375,068	$143,977,357
77	77	77	Mat-Su Borough	Elevator Code and Compliance Upgrades, 6	$1,767,988	$1,767,988	$0	$1,767,988	$618,796	$1,149,192	$145,126,549
78	78	78	Lower Yukon	LYSD Central Office Renovation	$4,909,855	$4,909,855	$0	$4,909,855	$98,197	$4,811,658	$149,938,207
79	79	79	Fairbanks Borough	Lathrop High School Kitchen Upgrade	$3,277,438	$1,649,500	$0	$1,649,500	$577,325	$1,072,175	$151,010,382
80	80	80	Juneau Borough	Dzantiki Heen'i Middle School Roof Replacement	$2,650,000	$2,650,000	$0	$2,650,000	$927,500	$1,722,500	$152,732,882
81	81	81	Ketchikan Borough	Schoenbar Middle School Gym Floor Replacement	$1,191,191	$731,951	$0	$731,951	$256,183	$475,768	$153,208,650
82	82	82	Fairbanks Borough	Tanana Middle School Classroom Upgrades	$10,471,326	$10,471,326	$0	$10,471,326	$3,664,964	$6,806,362	$160,015,012
83	83	83	Kake City	Kake High School Gym Floor Replacement	$306,042	$306,042	$0	$306,042	$61,208	$244,834	$160,259,846
84	84	84	Fairbanks Borough	Weller Elementary School Classroom Upgrades	$6,573,339	$6,573,339	$0	$6,573,339	$2,300,669	$4,272,670	$164,532,516
85	85	85	Mat-Su Borough	Structural Seismic Upgrades, 5 Sites	$13,394,677	$13,394,677	$0	$13,394,677	$4,688,137	$8,706,540	$173,239,056
86	86	86	Kenai Peninsula Borough	Seward Middle School Exterior Repair	$896,630	$896,630	$0	$896,630	$313,820	$582,810	$173,821,866
87	87	87	Juneau Borough	Riverbend Elementary School Roof Replacement	$2,800,000	$2,800,000	$0	$2,800,000	$980,000	$1,820,000	$175,641,866

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88	88	88	Mat-Su Borough	Colony and Wasilla Middle Schools Roof Replacement	$5,218,877	$5,218,877	$0	$5,218,877	$1,826,607	$3,392,270	$179,034,136
89	89	89	Southwest Region	Aleknagik K-12 School Renovation	$12,409,382	$9,219,351	$0	$9,219,351	$184,387	$9,034,964	$188,069,100
90	90	90	Southeast Island	Thorne Bay K-12 School Underground Storage Tank Replacement	$782,932	$782,932	$0	$782,932	$15,659	$767,273	$188,836,373
91	91	91	Fairbanks Borough	Pearl Creek Elementary School Classroom Upgrades	$6,360,238	$6,360,238	$0	$6,360,238	$2,226,083	$4,134,155	$192,970,528
92	92	92	Southeast Island	Port Alexander and Thorne Bay K-12 Schools Roof Replacement	$4,575,722	$4,575,722	$0	$4,575,722	$91,514	$4,484,208	$197,454,736
93	93	93	Lower Yukon	Kotlik and Pilot Station K-12 Schools Renewal and Repair	$4,854,617	$4,854,617	$0	$4,854,617	$97,092	$4,757,525	$202,212,261
94	94	94	Fairbanks Borough	Anne Wien Elementary School Exterior Renovation	$7,921,479	$5,974,021	$0	$5,974,021	$2,090,907	$3,883,114	$206,095,375
95	95	95	Mat-Su Borough	Ceiling and Sprinkler Seismic Mitigation, 5 Sites	$4,150,251	$4,150,251	$0	$4,150,251	$1,452,588	$2,697,663	$208,793,038
96	96	96	Mat-Su Borough	HVAC Control Upgrades, 5 Sites	$10,983,451	$10,983,451	$0	$10,983,451	$3,844,208	$7,139,243	$215,932,281
97	97	97	Lower Yukon	Sheldon Point K-12 School Exterior Repairs, Nunam Iqua	$1,973,987	$1,973,987	$0	$1,973,987	$39,480	$1,934,507	$217,866,788
Totals Totals Totals see column D-I				**Totals:**	**$304,141,350**	**$280,336,500**	**$0**	**$280,336,500**	**$62,469,712**	**$217,866,788**	nd of workbook

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1	1	1	Lower Kuskokwim	Newtok Relocation/Replacement K-12 School, Mertarvik	30.00	11.08	30.00	20.00	0.00	3.17	50.00	30.00	22.24	10.00	30.00	4.00	2.33	2.67	2.00	3.00	25.00	2.86	18.00	20.67	3.00	4.67	11.00	335.69
2	2	2	Lower Kuskokwim	Anna Tobeluk Memorial K-12 School Renovation/Addition, Nunapitchuk	24.00	25.45	0.00	10.00	0.00	3.30	26.50	17.55	21.89	10.00	30.00	4.00	2.00	2.33	2.00	2.00	0.00	15.82	20.00	13.33	4.00	3.00	13.67	250.84
3	3	3	Northwest Arctic Bor	Deering K-12 School Renovation/Addition	24.00	22.31	0.00	10.00	0.00	2.58	9.18	12.34	24.21	10.00	25.00	2.00	2.00	2.67	2.00	2.67	0.00	14.24	18.33	15.00	6.67	4.00	8.67	217.86
4	4	4	Anchorage	Homestead Elementary School Safety Improvements	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	16.57	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	12.58	2.33	26.00	3.67	0.00	5.00	181.11
5	5	5	Bering Strait	Brevig Mission K-12 School Addition	30.00	15.57	0.00	0.00	0.00	2.18	7.89	12.88	21.88	8.00	25.00	2.00	1.00	3.00	1.33	1.00	0.00	5.71	15.00	17.67	0.00	1.33	6.33	177.77
6	6	6	Hoonah City	Hoonah School Playground Improvements	27.00	30.00	0.00	25.00	0.00	1.72	0.00	0.00	0.00	0.00	30.00	3.00	3.67	3.00	2.33	2.00	0.00	6.34	2.00	29.00	0.00	1.67	8.33	175.06
7	7	7	Ketchikan Borough	Valley Park Complex Upgrades	24.00	30.00	0.00	25.00	0.00	2.38	0.00	0.00	0.00	0.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	0.00	1.00	26.33	1.67	0.00	5.33	157.05
8	8	8	Anchorage	Secure Vestibules, Group 3, 5 Sites	6.00	30.00	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	0.00	6.00	26.33	1.00	3.00	5.67	152.27
9	9	9	Anchorage	Secure Vestibules, Group 2, 3 Sites	9.00	24.68	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	0.00	6.00	25.67	1.00	3.00	5.67	149.29
10	10	10	Lower Kuskokwim	Water Storage and Treatment, Kongiganak	15.00	1.00	0.00	20.00	0.00	3.17	0.00	0.00	0.00	8.00	30.00	4.00	2.00	3.00	2.00	3.00	0.00	23.00	0.00	16.67	3.00	2.00	10.33	146.17
11	11	11	Anchorage	Secure Vestibules, Group 1, 3 Sites	12.00	11.43	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	0.00	6.00	27.00	1.00	3.00	5.67	140.37
12	12	12	Ketchikan Borough	Playground Equipment and Surface Upgrades, 3 Sites	21.00	30.00	0.00	10.00	0.00	2.38	0.00	0.00	0.00	0.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	6.26	5.00	14.33	3.33	0.00	6.33	139.97
13	13	13	Kenai Peninsula Bor	Kenai Middle School Security	21.00	30.00	0.00	10.00	0.00	2.78	0.00	0.00	0.00	0.00	30.00	3.00	2.33	4.00	3.00	4.00	0.00	3.18	5.67	12.67	0.00	0.00	6.33	137.96
14	14	14	Mat-Su Borough	Mat-Su Central Replacement Facility	30.00	0.00	0.00	0.00	0.00	2.25	0.00	0.00	21.96	0.00	25.00	1.00	1.00	2.00	2.00	1.00	0.00	0.00	6.67	7.00	1.33	1.00	3.67	105.88
15	15	15	Mat-Su Borough	District Athletic Field Upgrades	12.00	22.53	0.00	10.00	0.00	2.25	0.00	0.00	0.00	0.00	25.00	1.00	1.00	2.00	2.00	1.00	0.00	0.80	7.33	8.00	1.67	1.00	4.00	101.58
16	16	16	Fairbanks Borough	University Park Elementary Site Improvements	27.00	17.75	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	3.03	0.00	5.67	0.00	0.00	0.00	101.56
17	17	17	Fairbanks Borough	West Valley High School Auditorium Upgrade	3.00	20.60	0.00	0.00	0.00	3.45	0.00	0.00	0.00	8.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	1.00	0.00	8.67	0.00	0.00	0.00	89.38

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1	1	1	Yukon-Koyukuk	Rampart K-12 School Renewal	27.00	30.00	0.00	20.00	0.00	2.49	0.00	0.00	0.00	10.00	30.00	3.00	2.33	3.00	2.00	2.67	0.00	50.00	6.33	20.67	5.67	0.00	11.67	226.82
2	2	2	Bristol Bay Borough	Bristol Bay School Renovations, Phase 2 Supplemental	30.00	30.00	0.00	25.00	0.00	0.89	0.00	0.00	0.00	0.00	30.00	2.00	2.00	3.00	1.67	2.00	0.00	29.69	2.00	28.00	6.33	0.00	10.67	203.25
3	3	3	Iditarod Area	Blackwell K-12 School Renovations, Anvik	27.00	30.00	0.00	10.00	0.00	2.65	0.00	0.00	0.00	10.00	30.00	2.00	1.67	1.33	2.00	1.67	6.67	43.42	0.00	15.00	3.00	0.00	4.67	191.07
4	4	4	Lower Kuskokwim	Nuniwaarmiut K-12 School Wastewater Upgrades, Mekoryuk Supplemental	21.00	30.00	0.00	25.00	0.00	3.17	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	2.00	3.00	7.00	18.00	0.00	19.00	3.33	0.00	19.33	189.84
5	5	5	Anchorage	Orion Elementary School Roof Replacement	15.00	30.00	0.00	25.00	0.00	4.61	0.00	0.00	0.00	10.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	18.31	2.33	25.00	5.33	0.00	6.33	186.59
6	6	6	Kenai Peninsula Borough	Homer High School Partial Roof Replacement	30.00	24.75	0.00	25.00	0.00	2.78	0.00	0.00	0.00	5.00	30.00	3.00	2.33	4.00	3.00	4.00	0.00	10.25	0.00	26.00	3.33	0.00	7.67	181.11
7	7	7	Anchorage	Government Hill Elementary School Roof Replacement	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	27.66	2.00	27.67	3.00	0.00	5.33	180.63
8	8	8	Lower Kuskokwim	Bethel Campus Fire Pump House and Fire Protection Upgrades Supplemental	18.00	30.00	0.00	20.00	0.00	3.17	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	2.00	3.00	5.00	16.41	0.00	19.67	2.67	0.00	21.33	180.25
9	9	9	Nome City	Nome Beltz Jr/Sr High School Roof Replacement Supplemental	30.00	30.00	0.00	25.00	0.00	1.30	0.00	0.00	0.00	0.00	30.00	3.00	2.67	3.00	2.00	1.00	0.00	13.99	0.00	24.33	5.00	0.00	8.67	179.96
10	10	10	Lower Yukon	Hooper Bay K-12 School Exterior Repairs	27.00	2.50	0.00	25.00	0.00	2.18	0.00	0.00	0.00	8.00	30.00	3.67	2.00	2.33	3.67	2.00	5.00	19.25	3.67	27.00	4.00	0.00	12.33	179.60
11	11	11	Anchorage	Stellar Secondary School Fire Alarm	24.00	30.00	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	20.00	0.00	26.33	4.67	0.00	0.00	179.27
12	12	12	Anchorage	Birchwood Elementary School Boiler Replacement	27.00	30.00	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	3.32	1.67	26.33	5.33	0.00	10.33	178.27
13	13	13	Nenana City	Nenana School Flooring and Asbestos Abatement	30.00	30.00	0.00	25.00	0.00	3.25	0.00	0.00	0.00	5.00	30.00	2.00	2.33	3.00	2.00	3.00	0.00	8.00	2.33	21.67	2.67	0.00	7.67	177.92
14	14	14	Anchorage	Mears Middle School Roof Replacement	18.00	24.75	0.00	25.00	0.00	4.61	0.00	0.00	0.00	10.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	9.54	2.00	27.67	4.67	0.00	6.67	177.56
15	15	24	Kuspuk	Jack Egnaty Sr. K-12 School Roof Replacement, Sleetmute	30.00	30.00	0.00	10.00	0.00	1.76	0.00	0.00	0.00	10.00	30.00	2.33	2.00	2.00	2.00	2.00	14.67	9.95	2.00	13.67	5.67	0.00	9.00	177.05
16	16	15	Denali Borough	Tri-Valley School Partial Roof Replacement	30.00	20.89	0.00	10.00	0.00	2.63	0.00	0.00	0.00	10.00	30.00	2.00	3.00	3.00	2.00	2.67	0.00	31.46	2.33	14.00	5.00	0.00	7.33	176.31
17	17	16	Kake City	Exterior Upgrades - Main School Facilities	30.00	30.00	0.00	10.00	0.00	1.56	0.00	0.00	0.00	8.00	30.00	3.00	3.33	3.00	2.00	3.00	5.00	20.01	0.00	15.00	2.00	0.00	9.00	174.91
18	18	17	Nome City	Nome Beltz Jr/Sr High School Generator Replacement	24.00	30.00	0.00	25.00	0.00	1.31	0.00	0.00	0.00	0.00	30.00	2.67	3.00	2.33	2.33	2.67	0.00	15.00	0.00	24.33	0.00	0.00	12.00	174.65
19	19	18	Lower Kuskokwim	Qugcuun Memorial K-12 School Renovation, Oscarville	3.00	30.00	0.00	10.00	0.00	3.30	0.00	0.00	0.00	10.00	30.00	4.00	2.00	2.33	2.00	2.00	0.00	50.00	1.67	13.33	3.67	0.00	7.33	174.63
20	20	19	Valdez City	Districtwide Generator Replacement	30.00	19.69	0.00	25.00	0.00	1.37	0.00	0.00	0.00	10.00	30.00	3.00	3.00	2.33	2.33	2.33	0.00	4.00	0.00	28.33	2.33	0.00	10.67	174.40
21	21	20	Ketchikan Borough	Ketchikan High School Security Upgrades	30.00	30.00	0.00	25.00	0.00	2.38	0.00	0.00	0.00	0.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	0.00	0.00	24.67	12.00	0.00	7.67	173.05
22	22	21	Anchorage	Homestead Elementary School Roof Replacement	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	21.05	1.67	27.00	2.67	0.00	5.33	172.69
23	23	22	Anchorage	King Tech High School Roof Replacement	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	21.35	1.67	27.33	1.67	0.00	5.00	171.98
24	24	23	Anchorage	East High School Gym Improvements	3.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	20.98	1.33	25.67	3.00	0.00	2.00	170.94

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25	25	25	Nenana City	Nenana School Boiler Replacement	27.00	30.00	0.00	20.00	0.00	3.25	0.00	0.00	0.00	3.00	30.00	2.00	2.33	3.00	2.00	3.00	0.00	15.00	0.00	17.00	4.00	0.00	7.67	169.25
26	26	26	Lower Yukon	Marshall K-12 School Emergency Tank Farm Repair	30.00	0.50	0.00	25.00	0.00	2.18	0.00	0.00	0.00	10.00	30.00	3.67	2.00	2.33	3.67	2.00	6.67	9.61	0.00	28.00	4.33	1.33	7.67	168.96
27	27	27	Aleutians East Borough	Sand Point K-12 School Pool Major Maintenance	30.00	22.07	0.00	25.00	0.00	1.52	0.00	0.00	0.00	0.00	30.00	2.67	3.00	2.00	2.67	2.33	0.00	4.00	0.33	29.00	7.67	0.00	6.67	168.92
28	28	28	Anchorage	North Star Elementary School Roof Replacement	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	16.34	1.67	26.00	3.00	0.00	5.67	167.63
29	29	29	Anchorage	Service High School Health and Safety Improvements	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	5.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	20.20	2.67	27.00	2.33	0.00	5.33	167.50
30	30	30	Haines Borough	Haines High School Roof Replacement	30.00	30.00	0.00	10.00	0.00	1.27	0.00	0.00	0.00	8.00	30.00	2.67	2.00	3.00	2.00	2.00	5.67	15.00	0.00	14.00	3.33	0.00	8.33	167.27
31	31	31	Lower Kuskokwim	Gladys Jung Elementary School Heating Mains Replacement	27.00	2.80	0.00	25.00	0.00	3.30	0.00	0.00	0.00	3.00	30.00	4.00	2.00	2.33	2.00	2.00	5.00	17.64	0.00	29.00	2.33	0.00	7.67	165.07
32	32	32	Anchorage	O'Malley Elementary School Renovation	0.00	30.00	0.00	10.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	22.84	1.33	27.00	4.67	0.00	7.67	163.47
33	33	33	Northwest Arctic Borough	June Nelson Elementary School Partial Roof Replacement	30.00	30.00	0.00	10.00	0.00	2.58	0.00	0.00	0.00	10.00	25.00	2.00	2.00	2.67	2.00	2.67	3.33	13.43	0.00	16.00	3.33	0.00	7.00	162.02
34	34	34	Valdez City	Hermon Hutchens Elementary School	27.00	30.00	0.00	25.00	0.00	1.34	0.00	0.00	0.00	3.00	20.00	2.33	2.33	2.67	2.00	3.00	0.00	4.00	0.00	28.67	2.67	0.00	7.67	161.67
35	35	35	Lower Kuskokwim	Akula Elitnauvik K-12 School Renovation, Kasigluk-Akula	12.00	26.76	0.00	10.00	0.00	3.30	0.00	0.00	0.00	10.00	30.00	4.00	2.00	2.33	2.00	2.00	5.00	23.04	2.33	14.00	3.33	0.00	9.33	161.43
36	36	36	Denali Borough	Districtwide Electrical Code Upgrades	24.00	30.00	0.00	10.00	0.00	2.63	0.00	0.00	0.00	8.00	30.00	2.00	3.00	3.00	2.00	2.67	0.00	20.52	0.00	15.67	1.33	0.00	5.33	160.16
37	37	37	Anchorage	Bear Valley Elementary School Domestic Water Replacement	21.00	26.50	0.00	20.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	8.95	0.00	26.67	4.67	0.00	3.00	160.06
38	38	38	Anchorage	Abbott Loop Elementary School Fire Sprinklers	30.00	30.00	0.00	0.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	31.42	0.00	14.67	1.00	0.00	3.67	160.03
39	39	39	Haines Borough	Haines High School Locker Room Renovation	27.00	30.00	0.00	10.00	0.00	1.27	0.00	0.00	0.00	3.00	30.00	2.67	2.00	3.00	2.00	2.00	0.00	20.69	0.00	13.00	4.33	0.00	9.00	159.97
40	40	40	Hoonah City	Hoonah Central Boiler Replacement	30.00	30.00	0.00	10.00	0.00	1.49	0.00	0.00	0.00	8.00	30.00	1.67	2.00	2.00	2.67	2.00	0.00	6.00	0.00	14.00	8.33	0.00	9.67	157.83
41	41	41	Nome City	Nome Elementary School Fire Alarm Replacement	27.00	21.25	0.00	25.00	0.00	1.30	0.00	0.00	0.00	0.00	30.00	3.00	2.67	3.00	2.00	1.00	5.00	7.00	0.00	21.33	1.33	0.00	6.33	157.22
42	42	42	Yupiit	Mechanical System Improvements, 3 Schools	30.00	3.69	0.00	25.00	0.00	1.80	0.00	0.00	0.00	0.00	30.00	2.00	3.33	3.00	3.00	3.00	0.00	6.77	1.33	27.00	8.33	0.00	8.00	156.25
43	43	43	Denali Borough	Tri-Valley School Septic System Upgrades	27.00	30.00	0.00	10.00	0.00	2.63	0.00	0.00	0.00	8.00	30.00	2.00	3.00	3.00	2.00	2.67	0.00	12.11	0.00	14.33	1.67	0.00	7.67	156.07
44	44	44	Alaska Gateway	Tetlin K-12 School Renovation	30.00	23.00	0.00	10.00	0.00	2.40	0.00	0.00	0.00	10.00	25.00	3.33	2.00	3.00	1.67	3.00	0.00	20.66	0.00	16.00	2.67	0.00	1.67	154.39
45	45	45	Lower Yukon	Hooper Bay K-12 School Emergency Lighting and Retrofit	15.00	2.50	0.00	25.00	0.00	2.18	0.00	0.00	0.00	5.00	30.00	3.67	2.00	2.33	3.67	2.00	0.00	9.07	1.67	28.67	11.00	0.00	10.00	153.75
46	46	46	Alaska Gateway	Tok K-12 School Partial Roof Replacement	27.00	11.00	0.00	10.00	0.00	2.40	0.00	0.00	0.00	10.00	25.00	3.33	2.00	3.00	1.67	3.00	0.00	25.00	2.00	14.33	2.33	0.00	11.67	153.73
47	47	47	Northwest Arctic Borough	Davis-Ramoth K-12 School Rehabilitation, Selawik	27.00	14.73	0.00	10.00	0.00	2.69	0.00	0.00	0.00	10.00	25.00	3.00	2.33	3.00	2.33	2.67	0.00	11.50	5.33	17.33	4.67	0.00	11.67	153.25
48	48	48	Kodiak Island Borough	Main Elementary School Roof Replacement	30.00	30.00	0.00	10.00	0.00	2.61	0.00	0.00	0.00	10.00	30.00	2.67	2.00	3.00	2.33	2.00	0.00	8.00	0.00	13.00	1.33	0.00	4.33	151.28
49	49	49	Alaska Gateway	Northway K-12 School Mechanical Renovation	24.00	30.00	0.00	10.00	0.00	2.40	0.00	0.00	0.00	10.00	25.00	3.33	2.00	3.00	1.67	3.00	0.00	13.61	0.00	15.67	5.67	0.00	1.33	150.68

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50	50	50	Southeast Island	Thorne Bay K-12 School Fire Suppression System	30.00	13.49	0.00	10.00	0.00	2.57	0.00	0.00	0.00	8.00	30.00	1.67	3.00	2.00	2.00	2.00	10.00	6.87	0.00	13.67	5.00	0.00	10.33	150.60
51	51	51	Lower Yukon	Scammon Bay K-12 School Emergency Lighting and Retrofit	12.00	3.00	0.00	25.00	0.00	2.18	0.00	0.00	0.00	5.00	30.00	3.67	2.00	2.33	3.67	2.00	0.00	9.07	1.67	28.67	10.33	0.00	10.00	150.59
52	52	52	Yupiit	Tuluksak K-12 School Generator Replacement	24.00	4.00	0.00	25.00	0.00	1.80	0.00	0.00	0.00	0.00	30.00	2.00	3.33	3.00	3.00	3.00	5.67	15.00	0.00	16.33	3.00	0.00	10.33	149.46
53	53	53	Yukon-Koyukuk	Roof Replacement, 3 Schools	30.00	29.85	0.00	10.00	0.00	2.49	0.00	0.00	0.00	10.00	30.00	3.00	2.33	3.00	2.00	2.67	0.00	0.00	0.00	15.00	3.67	0.00	4.67	148.67
54	54	54	Lower Yukon	Scammon Bay K-12 School Exterior Upgrades	24.00	3.50	0.00	25.00	0.00	2.29	0.00	0.00	0.00	8.00	30.00	2.33	2.00	2.33	3.00	3.00	0.00	1.86	0.00	26.33	4.00	0.00	9.67	147.31
55	55	55	Southwest Region	Twin Hills K-12 School Renovation	30.00	30.00	0.00	10.00	0.00	1.48	0.00	0.00	0.00	10.00	25.00	1.00	2.00	2.33	2.00	2.00	0.00	8.71	0.00	11.00	8.00	0.00	3.67	147.18
56	56	56	Kodiak Island Borough	Chiniak K-12 School Water Code Compliance and Upgrade	27.00	30.00	0.00	10.00	0.00	2.61	0.00	0.00	0.00	0.00	30.00	2.67	2.00	3.00	2.33	2.00	0.00	18.00	0.00	11.67	2.33	0.00	2.33	145.94
57	57	57	Lower Kuskokwim	Bethel Regional High School Boardwalk Replacement	6.00	30.00	0.00	10.00	0.00	3.17	0.00	0.00	0.00	8.00	30.00	4.00	2.00	3.00	2.00	3.00	0.00	19.06	0.00	14.67	2.00	0.00	7.00	143.90
58	58	58	Fairbanks Borough	Administrative Center Exterior Renovation	21.00	11.75	0.00	10.00	0.00	3.45	0.00	0.00	0.00	10.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	19.26	0.00	11.33	4.33	0.00	6.00	141.80
59	59	59	Southeast Island	Thorne Bay K-12 School Mechanical Control Upgrades	27.00	13.49	0.00	10.00	0.00	2.57	0.00	0.00	0.00	8.00	30.00	1.67	3.00	2.00	2.00	2.00	3.33	8.00	0.00	14.33	8.00	0.00	6.33	141.73
60	60	60	Southeast Island	Thorne Bay K-12 School Flooring Replacement	15.00	13.49	0.00	25.00	0.00	2.57	0.00	0.00	0.00	0.00	30.00	1.67	3.00	2.00	2.00	2.00	0.00	4.00	0.00	28.00	3.33	0.00	8.67	140.73
61	61	61	Sitka Borough	Keet Gooshi Heen Elementary Covered PE Structure Renovation	30.00	19.50	0.00	10.00	0.00	0.90	0.00	0.00	0.00	3.00	30.00	2.67	2.00	2.00	2.00	2.67	0.00	5.15	1.00	16.33	3.00	0.00	10.00	140.22
62	62	62	Denali Borough	Generator Replacement, 3 Schools	21.00	30.00	0.00	10.00	0.00	2.63	0.00	0.00	0.00	8.00	30.00	2.00	3.00	3.00	2.00	2.67	0.00	4.31	0.00	14.00	1.33	0.00	5.67	139.60
63	63	63	Fairbanks Borough	North Pole High School Renovation	24.00	26.50	0.00	10.00	0.00	3.45	0.00	0.00	0.00	8.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	13.41	0.00	8.67	0.00	0.00	0.00	138.69
64	64	64	Iditarod Area	David-Louis Memorial K-12 School Roof Replacement, Grayling	30.00	19.50	0.00	10.00	0.00	2.67	0.00	0.00	0.00	5.00	30.00	2.00	1.67	1.00	1.00	2.00	0.00	5.42	0.00	14.33	2.67	0.00	10.67	137.92
65	65	65	Kake City	Kake High School Flooring Replacement	24.00	30.00	0.00	10.00	0.00	1.56	0.00	0.00	0.00	0.00	30.00	3.00	3.33	3.00	2.00	3.00	0.00	4.00	0.00	14.67	1.00	0.00	8.00	137.56
66	66	66	Nome City	Nome Beltz Jr/Sr High and Nome Elementary Schools Secure Access and ADA Improvements	21.00	30.00	0.00	10.00	0.00	1.30	0.00	0.00	0.00	0.00	30.00	3.00	2.67	3.00	2.00	1.00	0.00	6.49	2.00	16.33	2.33	0.00	5.67	136.79
67	67	67	Nenana City	Nenana School Fire Suppression System Replacement	24.00	30.00	0.00	0.00	0.00	3.25	0.00	0.00	0.00	0.00	30.00	2.00	2.33	3.00	2.00	3.00	10.00	2.00	0.00	15.67	2.00	0.00	7.33	136.59
68	68	68	Saint Marys City	St. Mary's Campus Renewal and Repairs	30.00	30.00	0.00	10.00	0.00	1.12	0.00	0.00	0.00	0.00	30.00	2.00	3.00	3.00	2.33	2.33	0.00	3.03	1.00	13.33	0.00	0.00	4.67	135.82
69	69	69	Fairbanks Borough	Arctic Light Elementary School Exterior Renovation	18.00	11.75	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	33.28	0.00	12.67	4.67	0.00	6.67	135.14
70	70	70	Lower Kuskokwim	Akiuk Memorial K-12 School Renovation, Kasigluk-Akiuk	9.00	11.50	0.00	10.00	0.00	3.30	0.00	0.00	0.00	10.00	30.00	4.00	2.00	2.33	2.00	2.00	0.00	22.99	2.00	14.00	2.67	0.00	6.33	134.12
71	71	71	Southeast Island	Port Alexander K-12 School Domestic Water Pipe Replacement	18.00	28.13	0.00	0.00	0.00	2.39	0.00	0.00	0.00	3.00	30.00	2.00	3.67	2.67	2.00	2.00	5.00	11.67	0.00	14.00	2.67	0.00	6.33	133.52
72	72	72	Southwest Region	Ekwok K-12 School Renovation	27.00	30.00	0.00	0.00	0.00	1.48	0.00	0.00	0.00	0.00	25.00	1.00	2.00	2.33	2.00	2.00	0.00	18.71	0.00	11.33	6.67	0.00	3.67	133.19
73	73	73	Kenai Peninsula Borough	West Homer Elementary School North Wall Improvement	27.00	9.50	0.00	10.00	0.00	2.78	0.00	0.00	0.00	10.00	30.00	3.00	2.33	4.00	3.00	4.00	0.00	5.90	0.00	16.00	1.33	0.00	3.00	131.84
74	74	74	Yupiit	Tuluksak K-12 School Fuel Tank Replacement	27.00	4.00	0.00	10.00	0.00	1.80	0.00	0.00	0.00	3.00	30.00	2.00	3.33	3.00	3.00	3.00	6.67	10.00	0.00	14.00	2.67	0.00	8.33	131.80

Alaska Department of Education and Early Development
FY2024 Capital Improvement Projects
Major Maintenance Grant Fund
Total Points - Formula Driven and Evaluative
Final List

Feb 2 Rank	Dec 21 Rank	Nov 5 Rank	School District	Project Name	School Dist Rank	Weight Avg Age	Prev. 14.11 Fund	Plan and Design	Prior Design Use	Avg Expend Maint	Un-Housed Today	Un-Housed 7 Years	Type of Space	Cond Survey	O&M Rpts	Maint Mgt	Energy Mgt	Cusd Pgm	Maint Train	Capital Plan	Emer-gency	Life/Safety and Code Conditions	Exist-ing Space	Cost Esti-mate	Proj vs Oper Cost	Altern at-ives	Options	Total Project Points
75	75	75	Kake City	Kake High School Plumbing Replacement	27.00	30.00	0.00	0.00	0.00	1.56	0.00	0.00	0.00	0.00	30.00	3.00	3.33	3.00	2.00	3.00	0.00	4.00	0.00	14.00	1.00	0.00	7.33	129.23
76	76	76	Ketchikan Borough	Houghtaling Elementary School Transformer Replacement	18.00	30.00	0.00	0.00	0.00	2.38	0.00	0.00	0.00	10.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	11.00	0.33	7.00	1.67	0.00	7.00	128.71
77	77	77	Mat-Su Borough	Elevator Code and Compliance Upgrades, 6 Sites	27.00	28.25	0.00	10.00	0.00	2.25	0.00	0.00	0.00	10.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	4.20	0.00	13.00	1.33	0.00	4.00	128.03
78	78	78	Lower Yukon	LYSD Central Office Renovation	9.00	29.69	0.00	0.00	0.00	2.18	0.00	0.00	0.00	0.00	30.00	3.67	2.00	2.33	3.67	2.00	0.00	16.53	0.00	13.00	5.33	0.00	7.33	126.74
79	79	79	Fairbanks Borough	Lathrop High School Kitchen Upgrade	30.00	30.00	0.00	0.00	0.00	3.45	0.00	0.00	0.00	8.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	2.60	0.00	8.00	0.00	0.00	0.00	126.72
80	80	80	Juneau Borough	Dzantiki Heen'i Middle School Roof Replacement	30.00	11.00	0.00	10.00	0.00	2.23	0.00	0.00	0.00	8.00	25.00	2.33	2.00	2.33	2.33	3.00	0.00	8.00	0.00	11.00	3.00	0.00	6.00	126.23
81	81	81	Ketchikan Borough	Schoenbar Middle School Gym Floor Replacement	27.00	30.00	0.00	0.00	0.00	2.38	0.00	0.00	0.00	0.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	5.05	1.33	9.67	1.67	0.00	5.67	124.10
82	82	82	Fairbanks Borough	Tanana Middle School Classroom Upgrades	12.00	30.00	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	17.98	0.00	12.67	0.00	0.00	3.33	124.09
83	83	83	Kake City	Kake High School Gym Floor Replacement	21.00	30.00	0.00	0.00	0.00	1.56	0.00	0.00	0.00	0.00	30.00	3.00	3.33	3.00	2.00	3.00	0.00	4.00	0.00	14.00	1.00	0.00	7.67	123.56
84	84	84	Fairbanks Borough	Weller Elementary School Classroom Upgrades	6.00	28.25	0.00	0.00	0.00	3.45	0.00	0.00	0.00	8.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	14.11	0.00	14.00	0.00	0.00	3.67	122.14
85	85	85	Mat-Su Borough	Structural Seismic Upgrades, 5 Sites	21.00	30.00	0.00	10.00	0.00	2.25	0.00	0.00	0.00	10.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	6.00	0.00	10.33	1.00	0.00	3.33	121.91
86	86	86	Kenai Peninsula Borough	Seward Middle School Exterior Repair	24.00	3.50	0.00	10.00	0.00	2.78	0.00	0.00	0.00	8.00	30.00	3.00	2.33	4.00	3.00	4.00	0.00	8.00	0.00	12.33	1.00	0.00	4.33	120.28
87	87	87	Juneau Borough	Riverbend Elementary School Roof Replacement	27.00	8.75	0.00	10.00	0.00	2.23	0.00	0.00	0.00	3.00	25.00	2.33	2.00	2.33	2.33	3.00	0.00	8.00	0.00	11.00	3.00	0.00	7.33	117.31
88	88	88	Mat-Su Borough	Colony and Wasilla Middle Schools Roof Replacement	27.00	15.30	0.00	10.00	0.00	2.25	0.00	0.00	0.00	8.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	8.02	0.00	14.00	2.00	0.00	2.00	116.56
89	89	89	Southwest Region	Aleknagik K-12 School Renovation	24.00	30.00	0.00	0.00	0.00	1.48	0.00	0.00	0.00	0.00	25.00	1.00	2.00	2.33	2.00	2.00	0.00	4.26	0.00	10.33	6.00	0.00	4.00	114.40
90	90	90	Southeast Island	Thorne Bay K-12 School Underground Storage Tank Replacement	24.00	13.49	0.00	10.00	0.00	2.57	0.00	0.00	0.00	0.00	30.00	1.67	3.00	2.00	2.00	2.00	0.00	2.00	0.00	15.00	0.00	0.00	6.00	113.73
91	91	91	Fairbanks Borough	Pearl Creek Elementary School Classroom Upgrades	9.00	28.25	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	10.02	0.00	14.00	0.00	0.00	3.67	113.05
92	92	92	Southeast Island	Port Alexander and Thorne Bay K-12 Schools Roof Replacement	21.00	15.78	0.00	0.00	0.00	2.39	0.00	0.00	0.00	0.00	30.00	2.00	3.67	2.67	2.00	2.00	0.00	6.00	0.67	14.33	2.67	0.00	5.00	110.17
93	93	93	Lower Yukon	Kotlik and Pilot Station K-12 Schools Renewal and Repair	18.00	5.00	0.00	10.00	0.00	2.29	0.00	0.00	0.00	5.00	30.00	2.33	2.00	2.33	3.00	3.00	0.00	5.69	0.00	13.00	2.67	0.00	5.00	109.32
94	94	94	Fairbanks Borough	Anne Wien Elementary School Exterior Renovation	15.00	10.25	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	9.41	0.00	14.00	5.67	0.00	6.33	108.78
95	95	95	Mat-Su Borough	Ceiling and Sprinkler Seismic Mitigation, 5 Sites	18.00	30.00	0.00	10.00	0.00	2.25	0.00	0.00	0.00	0.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	3.75	0.00	11.33	1.00	0.00	3.33	107.66
96	96	96	Mat-Su Borough	HVAC Control Upgrades, 5 Sites	15.00	24.51	0.00	10.00	0.00	2.25	0.00	0.00	0.00	0.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	5.60	2.33	12.00	4.33	0.00	3.00	107.03
97	97	97	Lower Yukon	Sheldon Point K-12 School Exterior Repairs, Nunam Iqua	21.00	2.00	0.00	0.00	0.00	2.29	0.00	0.00	0.00	5.00	30.00	2.33	2.00	2.33	3.00	3.00	0.00	0.65	0.00	13.33	3.00	0.00	8.00	97.94

Alaska Department of Education and Early Development
FY2024 Capital Improvement Projects
School Construction and Major Maintenance by Districts

Total Points - Formula-Driven and Evaluative
Final List

School District	Feb 2 Rank	Dec 21 Rank	Nov 5 Rank	MM/ SC	Project Name	School Dist Rank	Weight Avg Age	Prev. 14.11 Fund	Plan and Design	Prior Design Use	Avg Expend Maint	Un-Housed Today	Un-Housed 7 Years	Type of Space	Cond Survey	O&M Rpts	Maint Mgt	Energy Mgt	Cusd Pgm	Maint Train	Capital Plan	Emer-gency	Life/Safety and Code Conditions	Exist-ing Space	Cost Esti-mate	Proj vs Oper Cost	Alter nat-ives	Options	Total Project Points
Alaska Gateway	44	44	44	M	Tetlin K-12 School Renovation	30.00	23.00	0.00	10.00	0.00	2.40	0.00	0.00	0.00	10.00	25.00	3.33	2.00	3.00	1.67	3.00	0.00	20.66	0.00	16.00	2.67	0.00	1.67	154.39
Alaska Gateway	46	46	46	M	Tok K-12 School Partial Roof Replacement	27.00	11.00	0.00	10.00	0.00	2.40	0.00	0.00	0.00	10.00	25.00	3.33	2.00	3.00	1.67	3.00	0.00	25.00	2.00	14.33	2.33	0.00	11.67	153.73
Alaska Gateway	49	49	49	M	Northway K-12 School Mechanical Renovation	24.00	30.00	0.00	10.00	0.00	2.40	0.00	0.00	0.00	10.00	25.00	3.33	2.00	3.00	1.67	3.00	0.00	13.61	0.00	15.67	5.67	0.00	1.33	150.68
Aleutians East Boro	27	27	27	M	Sand Point K-12 School Pool Major Maintenance	30.00	22.07	0.00	25.00	0.00	1.52	0.00	0.00	0.00	0.00	30.00	2.67	3.00	2.00	2.67	2.33	0.00	4.00	0.33	29.00	7.67	0.00	6.67	168.92
Anchorage	4	4	4	C	Homestead Elementary School Safety Improvements	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	16.57	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	12.58	2.33	26.00	3.67	0.00	5.00	181.11
Anchorage	8	8	8	C	Secure Vestibules, Group 3, 5 Sites	6.00	30.00	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	0.00	6.00	26.33	1.00	3.00	5.67	152.27
Anchorage	9	9	9	C	Secure Vestibules, Group 2, 3 Sites	9.00	24.68	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	0.00	6.00	25.67	1.00	3.00	5.67	149.29
Anchorage	11	11	11	C	Secure Vestibules, Group 1, 3 Sites	12.00	11.43	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	0.00	6.00	27.00	1.00	3.00	5.67	140.37
Anchorage	5	5	5	M	Orion Elementary School Roof Replacement	15.00	30.00	0.00	25.00	0.00	4.61	0.00	0.00	0.00	10.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	18.31	2.33	25.00	5.33	0.00	6.33	186.59
Anchorage	7	7	7	M	Government Hill Elementary School Roof Replacement	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	27.66	2.00	27.67	3.00	0.00	5.33	180.63
Anchorage	11	11	11	M	Stellar Secondary School Fire Alarm	24.00	30.00	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	20.00	0.00	26.33	4.67	0.00	0.00	179.27
Anchorage	12	12	12	M	Birchwood Elementary School Boiler Replacement	27.00	30.00	0.00	25.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	3.32	1.67	26.33	5.33	0.00	10.33	178.27
Anchorage	14	14	14	M	Mears Middle School Roof Replacement	18.00	24.75	0.00	25.00	0.00	4.61	0.00	0.00	0.00	10.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	9.54	2.00	27.67	4.67	0.00	6.67	177.56
Anchorage	22	22	21	M	Homestead Elementary School Roof Replacement	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	21.05	1.67	27.00	2.67	0.00	5.33	172.69
Anchorage	23	23	22	M	King Tech High School Roof Replacement	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	21.35	1.67	27.33	1.67	0.00	5.00	171.98
Anchorage	24	24	23	M	East High School Gym Improvements	3.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	20.98	1.33	25.67	3.00	0.00	2.00	170.94
Anchorage	28	28	28	M	North Star Elementary School Roof Replacement	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	16.34	1.67	26.00	3.00	0.00	5.67	167.63
Anchorage	29	29	29	M	Service High School Health and Safety Improvements	0.00	30.00	0.00	25.00	0.00	4.63	0.00	0.00	0.00	5.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	20.20	2.67	27.00	2.33	0.00	5.33	167.50
Anchorage	32	32	32	M	O'Malley Elementary School Renovation	0.00	30.00	0.00	10.00	0.00	4.63	0.00	0.00	0.00	10.00	30.00	4.00	2.33	2.00	3.00	4.00	0.00	22.84	1.33	27.00	4.67	0.00	7.67	163.47
Anchorage	37	37	37	M	Bear Valley Elementary School Domestic Water Replacement	21.00	26.50	0.00	20.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	8.95	0.00	26.67	4.67	0.00	3.00	160.06
Anchorage	38	38	38	M	Abbott Loop Elementary School Fire Sprinklers	30.00	30.00	0.00	0.00	0.00	4.61	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	3.00	2.67	0.00	31.42	0.00	14.67	1.00	0.00	3.67	160.03
Bering Strait	5	5	5	C	Brevig Mission K-12 School Addition	30.00	15.57	0.00	0.00	0.00	2.18	7.89	12.88	21.88	8.00	25.00	2.00	1.00	3.00	1.33	1.00	0.00	5.71	15.00	17.67	0.00	1.33	6.33	177.77
Bristol Bay Borough	2	2	2	M	Bristol Bay School Renovations, Phase 2 Supplemental	30.00	30.00	0.00	25.00	0.00	0.89	0.00	0.00	0.00	0.00	30.00	2.00	2.00	3.00	1.67	2.00	0.00	29.69	2.00	28.00	6.33	0.00	10.67	203.25
Denali Borough	16	16	15	M	Tri-Valley School Partial Roof Replacement	30.00	20.89	0.00	10.00	0.00	2.63	0.00	0.00	0.00	10.00	30.00	2.00	3.00	3.00	2.00	2.67	0.00	31.46	2.33	14.00	5.00	0.00	7.33	176.31
Denali Borough	36	36	36	M	Districtwide Electrical Code Upgrades	24.00	30.00	0.00	10.00	0.00	2.63	0.00	0.00	0.00	8.00	30.00	2.00	3.00	3.00	2.00	2.67	0.00	20.52	0.00	15.67	1.33	0.00	5.33	160.16
Denali Borough	43	43	43	M	Tri-Valley School Septic System Upgrades	27.00	30.00	0.00	10.00	0.00	2.63	0.00	0.00	0.00	8.00	30.00	2.00	3.00	3.00	2.00	2.67	0.00	12.11	0.00	14.33	1.67	0.00	7.67	156.07
Denali Borough	62	62	62	M	Generator Replacement, 3 Schools	21.00	30.00	0.00	10.00	0.00	2.63	0.00	0.00	0.00	8.00	30.00	2.00	3.00	3.00	2.00	2.67	0.00	4.31	0.00	14.00	1.33	0.00	5.67	139.60
Fairbanks Borough	16	16	16	C	University Park Elementary Site Improvements	27.00	17.75	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	3.03	0.00	5.67	0.00	0.00	0.00	101.56
Fairbanks Borough	17	17	17	C	West Valley High School Auditorium Upgrade	3.00	20.60	0.00	0.00	0.00	3.45	0.00	0.00	0.00	8.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	1.00	0.00	8.67	0.00	0.00	0.00	89.38
Fairbanks Borough	58	58	58	M	Administrative Center Exterior Renovation	21.00	11.75	0.00	10.00	0.00	3.45	0.00	0.00	0.00	10.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	19.26	0.00	11.33	4.33	0.00	6.00	141.80
Fairbanks Borough	63	63	63	M	North Pole High School Renovation	24.00	26.50	0.00	10.00	0.00	3.45	0.00	0.00	0.00	8.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	13.41	0.00	8.67	0.00	0.00	0.00	138.69
Fairbanks Borough	69	69	69	M	Arctic Light Elementary School Exterior Renovation	18.00	11.75	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	33.28	0.00	12.67	4.67	0.00	6.67	135.14
Fairbanks Borough	79	79	79	M	Lathrop High School Kitchen Upgrade	30.00	30.00	0.00	0.00	0.00	3.45	0.00	0.00	0.00	8.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	2.60	0.00	8.00	0.00	0.00	0.00	126.72
Fairbanks Borough	82	82	82	M	Tanana Middle School Classroom Upgrades	12.00	30.00	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	17.98	0.00	12.67	0.00	0.00	3.33	124.09
Fairbanks Borough	84	84	84	M	Weller Elementary School Classroom Upgrades	6.00	28.25	0.00	0.00	0.00	3.45	0.00	0.00	0.00	8.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	14.11	0.00	14.00	0.00	0.00	3.67	122.14

Alaska Department of Education and Early Development
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Total Points - Formula-Driven and Evaluative
Final List

School District	Feb 2 Rank	Dec 21 Rank	Nov 5 Rank	MM/ SC	Project Name	School Dist Rank	Weight Avg Age	Prev. 14.11 Fund	Plan and Design	Prior Design Use	Avg Expend Maint	Un-Housed Today	Un-Housed 7 Years	Type of Space	Cond Survey	O&M Rpts	Maint Mgt	Energy Mgt	Cusd Pgm	Maint Train	Capital Plan	Emer-gency	Life/Safety and Code Conditions	Exist-ing Space	Cost Esti-mate	Proj vs Oper Cost	Alter nat-ives	Options	Total Project Points
Fairbanks Borough	91	91	91	M	Pearl Creek Elementary School Classroom Upgrades	9.00	28.25	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	10.02	0.00	14.00	0.00	0.00	3.67	113.05
Fairbanks Borough	94	94	94	M	Anne Wien Elementary School Exterior Renovation	15.00	10.25	0.00	0.00	0.00	3.45	0.00	0.00	0.00	0.00	30.00	2.00	3.00	4.00	2.67	3.00	0.00	9.41	0.00	14.00	5.67	0.00	6.33	108.78
Haines Borough	30	30	30	M	Haines High School Roof Replacement	30.00	30.00	0.00	10.00	0.00	1.27	0.00	0.00	0.00	8.00	30.00	2.67	2.00	3.00	2.00	2.00	5.67	15.00	0.00	14.00	3.33	0.00	8.33	167.27
Haines Borough	39	39	39	M	Haines High School Locker Room Renovation	27.00	30.00	0.00	10.00	0.00	1.27	0.00	0.00	0.00	3.00	30.00	2.67	2.00	3.00	2.00	2.00	0.00	20.69	0.00	13.00	4.33	0.00	9.00	159.97
Hoonah City	6	6	6	C	Hoonah School Playground Improvements	27.00	30.00	0.00	25.00	0.00	1.72	0.00	0.00	0.00	0.00	30.00	3.00	3.67	3.00	2.33	2.00	0.00	6.34	2.00	29.00	0.00	1.67	8.33	175.06
Hoonah City	40	40	40	M	Hoonah Central Boiler Replacement	30.00	30.00	0.00	10.00	0.00	1.49	0.00	0.00	0.00	8.00	30.00	1.67	2.00	2.00	2.67	2.00	0.00	6.00	0.00	14.00	8.33	0.00	9.67	157.83
Iditarod Area	3	3	3	M	Blackwell K-12 School Renovations, Anvik	27.00	30.00	0.00	10.00	0.00	2.65	0.00	0.00	0.00	10.00	30.00	2.00	1.67	1.33	2.00	1.67	6.67	43.42	0.00	15.00	3.00	0.00	4.67	191.07
Iditarod Area	64	64	64	M	David-Louis Memorial K-12 School Roof Replacement, Grayling	30.00	19.50	0.00	10.00	0.00	2.67	0.00	0.00	0.00	5.00	30.00	2.00	1.67	1.00	1.00	2.00	0.00	5.42	0.00	14.33	2.67	0.00	10.67	137.92
Juneau Borough	80	80	80	M	Dzantiki Heen'i Middle School Roof Replacement	30.00	11.00	0.00	10.00	0.00	2.23	0.00	0.00	0.00	8.00	25.00	2.33	2.00	2.33	2.33	3.00	0.00	8.00	0.00	11.00	3.00	0.00	6.00	126.23
Juneau Borough	87	87	87	M	Riverbend Elementary School Roof Replacement	27.00	8.75	0.00	10.00	0.00	2.23	0.00	0.00	0.00	3.00	25.00	2.33	2.00	2.33	2.33	3.00	0.00	8.00	0.00	11.00	3.00	0.00	7.33	117.31
Kake City	17	17	16	M	Exterior Upgrades - Main School Facilities	30.00	30.00	0.00	10.00	0.00	1.56	0.00	0.00	0.00	8.00	30.00	3.00	3.33	3.00	2.00	3.00	5.00	20.01	0.00	15.00	2.00	0.00	9.00	174.91
Kake City	65	65	65	M	Kake High School Flooring Replacement	24.00	30.00	0.00	10.00	0.00	1.56	0.00	0.00	0.00	0.00	30.00	3.00	3.33	3.00	2.00	3.00	0.00	4.00	0.00	14.67	1.00	0.00	8.00	137.56
Kake City	75	75	75	M	Kake High School Plumbing Replacement	27.00	30.00	0.00	0.00	0.00	1.56	0.00	0.00	0.00	0.00	30.00	3.00	3.33	3.00	2.00	3.00	0.00	4.00	0.00	14.00	1.00	0.00	7.33	129.23
Kake City	83	83	83	M	Kake High School Gym Floor Replacement	21.00	30.00	0.00	0.00	0.00	1.56	0.00	0.00	0.00	0.00	30.00	3.00	3.33	3.00	2.00	3.00	0.00	4.00	0.00	14.00	1.00	0.00	7.67	123.56
Kenai Peninsula Borough	13	13	13	C	Kenai Middle School Security Remodel	21.00	30.00	0.00	10.00	0.00	2.78	0.00	0.00	0.00	0.00	30.00	3.00	2.33	4.00	3.00	4.00	0.00	3.18	5.67	12.67	0.00	0.00	6.33	137.96
Kenai Peninsula Borough	6	6	6	M	Homer High School Partial Roof Replacement	30.00	24.75	0.00	25.00	0.00	2.78	0.00	0.00	0.00	5.00	30.00	3.00	2.33	4.00	3.00	4.00	0.00	10.25	0.00	26.00	3.33	0.00	7.67	181.11
Kenai Peninsula Borough	73	73	73	M	West Homer Elementary School North Wall Improvement	27.00	9.50	0.00	10.00	0.00	2.78	0.00	0.00	0.00	10.00	30.00	3.00	2.33	4.00	3.00	4.00	0.00	5.90	0.00	16.00	1.33	0.00	3.00	131.84
Kenai Peninsula Borough	86	86	86	M	Seward Middle School Exterior Repair	24.00	3.50	0.00	10.00	0.00	2.78	0.00	0.00	0.00	8.00	30.00	3.00	2.33	4.00	3.00	4.00	0.00	8.00	0.00	12.33	1.00	0.00	4.33	120.28
Ketchikan Borough	7	7	7	C	Valley Park Complex Upgrades	24.00	30.00	0.00	25.00	0.00	2.38	0.00	0.00	0.00	0.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	0.00	1.00	26.33	1.67	0.00	5.33	157.05
Ketchikan Borough	12	12	12	C	Playground Equipment and Surface Upgrades, 3 Sites	21.00	30.00	0.00	10.00	0.00	2.38	0.00	0.00	0.00	0.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	6.26	5.00	14.33	3.33	0.00	6.33	139.97
Ketchikan Borough	21	21	20	M	Ketchikan High School Security Upgrades	30.00	30.00	0.00	25.00	0.00	2.38	0.00	0.00	0.00	0.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	0.00	0.00	24.67	12.00	0.00	7.67	173.05
Ketchikan Borough	76	76	76	M	Houghtaling Elementary School Transformer Replacement	18.00	30.00	0.00	0.00	0.00	2.38	0.00	0.00	0.00	10.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	11.00	0.33	7.00	1.67	0.00	7.00	128.71
Ketchikan Borough	81	81	81	M	Schoenbar Middle School Gym Floor Replacement	27.00	30.00	0.00	0.00	0.00	2.38	0.00	0.00	0.00	0.00	30.00	2.67	2.33	2.00	2.33	2.00	0.00	5.05	1.33	9.67	1.67	0.00	5.67	124.10
Kodiak Island Borough	48	48	48	M	Main Elementary School Roof Replacement	30.00	30.00	0.00	10.00	0.00	2.61	0.00	0.00	0.00	10.00	30.00	2.67	2.00	3.00	2.33	2.00	0.00	8.00	0.00	13.00	1.33	0.00	4.33	151.28
Kodiak Island Borough	56	56	56	M	Chiniak K-12 School Water Code Compliance and Upgrade	27.00	30.00	0.00	10.00	0.00	2.61	0.00	0.00	0.00	0.00	30.00	2.67	2.00	3.00	2.33	2.00	0.00	18.00	0.00	11.67	2.33	0.00	2.33	145.94
Kuspuk	15	15	24	M	Jack Egnaty Sr. K-12 School Roof Replacement, Sleetmute	30.00	30.00	0.00	10.00	0.00	1.76	0.00	0.00	0.00	10.00	30.00	2.33	2.00	2.00	2.00	2.00	14.67	9.95	2.00	13.67	5.67	0.00	9.00	177.05
Lower Kuskokwim	1	1	1	C	Newtok Relocation/Replacement K-12 School, Mertarvik	30.00	11.08	30.00	20.00	0.00	3.17	50.00	30.00	22.24	10.00	30.00	4.00	2.33	2.67	2.00	3.00	25.00	2.86	18.00	20.67	3.00	4.67	11.00	335.69
Lower Kuskokwim	2	2	2	C	Anna Tobeluk Memorial K-12 School Renovation/Addition, Nunapitchuk	24.00	25.45	0.00	10.00	0.00	3.30	26.50	17.55	21.89	10.00	30.00	4.00	2.00	2.33	2.00	2.00	0.00	15.82	20.00	13.33	4.00	3.00	13.67	250.84
Lower Kuskokwim	10	10	10	C	Water Storage and Treatment, Kongiganak	15.00	1.00	0.00	20.00	0.00	3.17	0.00	0.00	0.00	8.00	30.00	4.00	2.00	3.00	2.00	3.00	0.00	23.00	0.00	16.67	3.00	2.00	10.33	146.17

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Lower Kuskokwim	4	4	4	M	Nuniwaarmiut K-12 School Wastewater Upgrades, Mekoryuk Supplemental	21.00	30.00	0.00	25.00	0.00	3.17	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	2.00	3.00	7.00	18.00	0.00	19.00	3.33	0.00	19.33	189.84
Lower Kuskokwim	8	8	8	M	Bethel Campus Fire Pump House and Fire Protection Upgrades Supplemental	18.00	30.00	0.00	20.00	0.00	3.17	0.00	0.00	0.00	0.00	30.00	4.00	2.00	3.00	2.00	3.00	5.00	16.41	0.00	19.67	2.67	0.00	21.33	180.25
Lower Kuskokwim	19	19	18	M	Qugcuun Memorial K-12 School Renovation, Oscarville	3.00	30.00	0.00	10.00	0.00	3.30	0.00	0.00	0.00	10.00	30.00	4.00	2.00	2.33	2.00	2.00	0.00	50.00	1.67	13.33	3.67	0.00	7.33	174.63
Lower Kuskokwim	31	31	31	M	Gladys Jung Elementary School Heating Mains Replacement	27.00	2.80	0.00	25.00	0.00	3.30	0.00	0.00	0.00	3.00	30.00	4.00	2.00	2.33	2.00	2.00	5.00	17.64	0.00	29.00	2.33	0.00	7.67	165.07
Lower Kuskokwim	35	35	35	M	Akula Elitnauvik K-12 School Renovation, Kasigluk-Akula	12.00	26.76	0.00	10.00	0.00	3.30	0.00	0.00	0.00	10.00	30.00	4.00	2.00	2.33	2.00	2.00	5.00	23.04	2.33	14.00	3.33	0.00	9.33	161.43
Lower Kuskokwim	57	57	57	M	Bethel Regional High School Boardwalk Replacement	6.00	30.00	0.00	10.00	0.00	3.17	0.00	0.00	0.00	8.00	30.00	4.00	2.00	3.00	2.00	3.00	0.00	19.06	0.00	14.67	2.00	0.00	7.00	143.90
Lower Kuskokwim	70	70	70	M	Akiuk Memorial K-12 School Renovation, Kasigluk-Akiuk	9.00	11.50	0.00	10.00	0.00	3.30	0.00	0.00	0.00	10.00	30.00	4.00	2.00	2.33	2.00	2.00	0.00	22.99	2.00	14.00	2.67	0.00	6.33	134.12
Lower Yukon	10	10	10	M	Hooper Bay K-12 School Exterior Repairs	27.00	2.50	0.00	25.00	0.00	2.18	0.00	0.00	0.00	8.00	30.00	3.67	2.00	2.33	3.67	2.00	5.00	19.25	3.67	27.00	4.00	0.00	12.33	179.60
Lower Yukon	26	26	26	M	Marshall K-12 School Emergency Tank Farm Repair	30.00	0.50	0.00	25.00	0.00	2.18	0.00	0.00	0.00	10.00	30.00	3.67	2.00	2.33	3.67	2.00	6.67	9.61	0.00	28.00	4.33	1.33	7.67	168.96
Lower Yukon	45	45	45	M	Hooper Bay K-12 School Emergency Lighting and Retrofit	15.00	2.50	0.00	25.00	0.00	2.18	0.00	0.00	0.00	5.00	30.00	3.67	2.00	2.33	3.67	2.00	0.00	9.07	1.67	28.67	11.00	0.00	10.00	153.75
Lower Yukon	51	51	51	M	Scammon Bay K-12 School Emergency Lighting and Retrofit	12.00	3.00	0.00	25.00	0.00	2.18	0.00	0.00	0.00	5.00	30.00	3.67	2.00	2.33	3.67	2.00	0.00	9.07	1.67	28.67	10.33	0.00	10.00	150.59
Lower Yukon	54	54	54	M	Scammon Bay K-12 School Exterior Upgrades	24.00	3.50	0.00	25.00	0.00	2.29	0.00	0.00	0.00	8.00	30.00	2.33	2.00	2.33	3.00	3.00	0.00	1.86	0.00	26.33	4.00	0.00	9.67	147.31
Lower Yukon	78	78	78	M	LYSD Central Office Renovation	9.00	29.69	0.00	0.00	0.00	2.18	0.00	0.00	0.00	0.00	30.00	3.67	2.00	2.33	3.67	2.00	0.00	16.53	0.00	13.00	5.33	0.00	7.33	126.74
Lower Yukon	93	93	93	M	Kotlik and Pilot Station K-12 Schools Renewal and Repair	18.00	5.00	0.00	10.00	0.00	2.29	0.00	0.00	0.00	5.00	30.00	2.33	2.00	2.33	3.00	3.00	0.00	5.69	0.00	13.00	2.67	0.00	5.00	109.32
Lower Yukon	97	97	97	M	Sheldon Point K-12 School Exterior Repairs, Nunam Iqua	21.00	2.00	0.00	0.00	0.00	2.29	0.00	0.00	0.00	5.00	30.00	2.33	2.00	2.33	3.00	3.00	0.00	0.65	0.00	13.33	3.00	0.00	8.00	97.94
Mat-Su Borough	14	14	14	C	Mat-Su Central Replacement Facility	30.00	0.00	0.00	0.00	0.00	2.25	0.00	0.00	21.96	0.00	25.00	1.00	1.00	2.00	2.00	1.00	0.00	0.00	6.67	7.00	1.33	1.00	3.67	105.88
Mat-Su Borough	15	15	15	C	District Athletic Field Upgrades	12.00	22.53	0.00	10.00	0.00	2.25	0.00	0.00	0.00	0.00	25.00	1.00	1.00	2.00	2.00	1.00	0.00	0.80	7.33	8.00	1.67	1.00	4.00	101.58
Mat-Su Borough	77	77	77	M	Elevator Code and Compliance Upgrades, 6 Sites	27.00	28.25	0.00	10.00	0.00	2.25	0.00	0.00	0.00	10.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	4.20	0.00	13.00	1.33	0.00	4.00	128.03
Mat-Su Borough	85	85	85	M	Structural Seismic Upgrades, 5 Sites	21.00	30.00	0.00	10.00	0.00	2.25	0.00	0.00	0.00	10.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	6.00	0.00	10.33	1.00	0.00	3.33	121.91
Mat-Su Borough	88	88	88	M	Colony and Wasilla Middle Schools Roof Replacement	27.00	15.30	0.00	10.00	0.00	2.25	0.00	0.00	0.00	8.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	8.02	0.00	14.00	2.00	0.00	2.00	116.56
Mat-Su Borough	95	95	95	M	Ceiling and Sprinkler Seismic Mitigation, 5 Sites	18.00	30.00	0.00	10.00	0.00	2.25	0.00	0.00	0.00	0.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	3.75	0.00	11.33	1.00	0.00	3.33	107.66
Mat-Su Borough	96	96	96	M	HVAC Control Upgrades, 5 Sites	15.00	24.51	0.00	10.00	0.00	2.25	0.00	0.00	0.00	0.00	20.00	1.00	1.00	2.00	2.00	2.00	0.00	5.60	2.33	12.00	4.33	0.00	3.00	107.03
Nenana City	13	13	13	M	Nenana School Flooring and Asbestos Abatement	30.00	30.00	0.00	25.00	0.00	3.25	0.00	0.00	0.00	5.00	30.00	2.00	2.33	3.00	2.00	3.00	0.00	8.00	2.33	21.67	2.67	0.00	7.67	177.92
Nenana City	25	25	25	M	Nenana School Boiler Replacement	27.00	30.00	0.00	20.00	0.00	3.25	0.00	0.00	0.00	3.00	30.00	2.00	2.33	3.00	2.00	3.00	0.00	15.00	0.00	17.00	4.00	0.00	7.67	169.25
Nenana City	67	67	67	M	Nenana School Fire Suppression System Replacement	24.00	30.00	0.00	0.00	0.00	3.25	0.00	0.00	0.00	0.00	30.00	2.00	2.33	3.00	2.00	3.00	10.00	2.00	0.00	15.67	2.00	0.00	7.33	136.59
Nome City	9	9	9	M	Nome Beltz Jr/Sr High School Roof Replacement Supplemental	30.00	30.00	0.00	25.00	0.00	1.30	0.00	0.00	0.00	0.00	30.00	3.00	2.67	3.00	2.00	1.00	0.00	13.99	0.00	24.33	5.00	0.00	8.67	179.96
Nome City	18	18	17	M	Nome Beltz Jr/Sr High School Generator Replacement	24.00	30.00	0.00	25.00	0.00	1.31	0.00	0.00	0.00	0.00	30.00	2.67	3.00	2.33	2.33	2.67	0.00	15.00	0.00	24.33	0.00	0.00	12.00	174.65
Nome City	41	41	41	M	Nome Elementary School Fire Alarm Replacement	27.00	21.25	0.00	25.00	0.00	1.30	0.00	0.00	0.00	0.00	30.00	3.00	2.67	3.00	2.00	1.00	5.00	7.00	0.00	21.33	1.33	0.00	6.33	157.22

Alaska Department of Education and Early Development
FY2024 Capital Improvement Projects
School Construction and Major Maintenance by Districts

Total Points - Formula-Driven and Evaluative
Final List

School District	Feb 2 Rank	Dec 21 Rank	Nov 5 Rank	MM/ SC	Project Name	School Dist Rank	Weight Avg Age	Prev. 14.11 Fund	Plan and Design	Prior Design Use	Avg Expend Maint	Un-Housed Today	Un-Housed 7 Years	Type of Space	Cond Survey	O&M Rpts	Maint Mgt	Energy Mgt	Cusd Pgm	Maint Train	Capital Plan	Emer-gency	Life/Safety and Code Conditions	Exist-ing Space	Cost Esti-mate	Proj vs Oper Cost	Alter nat-ives	Options	Total Project Points
Nome City	66	66	66	M	Nome Beltz Jr/Sr High and Nome Elementary Schools Secure Access and ADA Improvements	21.00	30.00	0.00	10.00	0.00	1.30	0.00	0.00	0.00	0.00	30.00	3.00	2.67	3.00	2.00	1.00	0.00	6.49	2.00	16.33	2.33	0.00	5.67	136.79
Northwest Arctic Borough	3	3	3	C	Deering K-12 School Renovation/Addition	24.00	22.31	0.00	10.00	0.00	2.58	9.18	12.34	24.21	10.00	25.00	2.00	2.00	2.67	2.00	2.67	0.00	14.24	18.33	15.00	6.67	4.00	8.67	217.86
Northwest Arctic Borough	33	33	33	M	June Nelson Elementary School Partial Roof Replacement	30.00	30.00	0.00	10.00	0.00	2.58	0.00	0.00	0.00	10.00	25.00	2.00	2.00	2.67	2.00	2.67	3.33	13.43	0.00	16.00	3.33	0.00	7.00	162.02
Northwest Arctic Borough	47	47	47	M	Davis-Ramoth K-12 School Rehabilitation, Selawik	27.00	14.73	0.00	10.00	0.00	2.69	0.00	0.00	0.00	10.00	25.00	3.00	2.33	3.00	2.33	2.67	0.00	11.50	5.33	17.33	4.67	0.00	11.67	153.25
Saint Marys City	68	68	68	M	St. Mary's Campus Renewal and Repairs	30.00	30.00	0.00	10.00	0.00	1.12	0.00	0.00	0.00	0.00	30.00	2.00	3.00	3.00	2.33	2.33	0.00	3.03	1.00	13.33	0.00	0.00	4.67	135.82
Sitka Borough	61	61	61	M	Keet Gooshi Heen Elementary Covered PE Structure Renovation	30.00	19.50	0.00	10.00	0.00	0.90	0.00	0.00	0.00	3.00	30.00	2.67	2.00	2.00	2.00	2.67	0.00	5.15	1.00	16.33	3.00	0.00	10.00	140.22
Southeast Island	50	50	50	M	Thorne Bay K-12 School Fire Suppression System	30.00	13.49	0.00	10.00	0.00	2.57	0.00	0.00	0.00	8.00	30.00	1.67	3.00	2.00	2.00	2.00	10.00	6.87	0.00	13.67	5.00	0.00	10.33	150.60
Southeast Island	59	59	59	M	Thorne Bay K-12 School Mechanical Control Upgrades	27.00	13.49	0.00	10.00	0.00	2.57	0.00	0.00	0.00	8.00	30.00	1.67	3.00	2.00	2.00	2.00	3.33	8.00	0.00	14.33	8.00	0.00	6.33	141.73
Southeast Island	60	60	60	M	Thorne Bay K-12 School Flooring Replacement	15.00	13.49	0.00	25.00	0.00	2.57	0.00	0.00	0.00	0.00	30.00	1.67	3.00	2.00	2.00	2.00	0.00	4.00	0.00	28.00	3.33	0.00	8.67	140.73
Southeast Island	71	71	71	M	Port Alexander K-12 School Domestic Water Pipe Replacement	18.00	28.13	0.00	0.00	0.00	2.39	0.00	0.00	0.00	3.00	30.00	2.00	3.67	2.67	2.00	2.00	5.00	11.67	0.00	14.00	2.67	0.00	6.33	133.52
Southeast Island	90	90	90	M	Thorne Bay K-12 School Underground Storage Tank Replacement	24.00	13.49	0.00	10.00	0.00	2.57	0.00	0.00	0.00	0.00	30.00	1.67	3.00	2.00	2.00	2.00	0.00	2.00	0.00	15.00	0.00	0.00	6.00	113.73
Southeast Island	92	92	92	M	Port Alexander and Thorne Bay K-12 Schools Roof Replacement	21.00	15.78	0.00	0.00	0.00	2.39	0.00	0.00	0.00	0.00	30.00	2.00	3.67	2.67	2.00	2.00	0.00	6.00	0.67	14.33	2.67	0.00	5.00	110.17
Southwest Region	55	55	55	M	Twin Hills K-12 School Renovation	30.00	30.00	0.00	10.00	0.00	1.48	0.00	0.00	0.00	10.00	25.00	1.00	2.00	2.33	2.00	2.00	0.00	8.71	0.00	11.00	8.00	0.00	3.67	147.18
Southwest Region	72	72	72	M	Ekwok K-12 School Renovation	27.00	30.00	0.00	0.00	0.00	1.48	0.00	0.00	0.00	0.00	25.00	1.00	2.00	2.33	2.00	2.00	0.00	18.71	0.00	11.33	6.67	0.00	3.67	133.19
Southwest Region	89	89	89	M	Aleknagik K-12 School Renovation	24.00	30.00	0.00	0.00	0.00	1.48	0.00	0.00	0.00	0.00	25.00	1.00	2.00	2.33	2.00	2.00	0.00	4.26	0.00	10.33	6.00	0.00	4.00	114.40
Valdez City	20	20	19	M	Districtwide Generator Replacement	30.00	19.69	0.00	25.00	0.00	1.37	0.00	0.00	0.00	10.00	30.00	3.00	3.00	2.33	2.33	2.33	0.00	4.00	0.00	28.33	2.33	0.00	10.67	174.40
Valdez City	34	34	34	M	Hermon Hutchens Elementary School Partial Flooring Replacement	27.00	30.00	0.00	25.00	0.00	1.34	0.00	0.00	0.00	3.00	20.00	2.33	2.33	2.67	2.00	3.00	0.00	4.00	0.00	28.67	2.67	0.00	7.67	161.67
Yukon-Koyukuk	1	1	1	M	Rampart K-12 School Renewal	27.00	30.00	0.00	20.00	0.00	2.49	0.00	0.00	0.00	10.00	30.00	3.00	2.33	3.00	2.00	2.67	0.00	50.00	6.33	20.67	5.67	0.00	11.67	226.82
Yukon-Koyukuk	53	53	53	M	Roof Replacement, 3 Schools	30.00	29.85	0.00	10.00	0.00	2.49	0.00	0.00	0.00	10.00	30.00	3.00	2.33	3.00	2.00	2.67	0.00	0.00	0.00	15.00	3.67	0.00	4.67	148.67
Yupiit	42	42	42	M	Mechanical System Improvements, 3 Schools	30.00	3.69	0.00	25.00	0.00	1.80	0.00	0.00	0.00	0.00	30.00	2.00	3.33	3.00	3.00	3.00	0.00	6.77	1.33	27.00	8.33	0.00	8.00	156.25
Yupiit	52	52	52	M	Tuluksak K-12 School Generator Replacement	24.00	4.00	0.00	25.00	0.00	1.80	0.00	0.00	0.00	0.00	30.00	2.00	3.33	3.00	3.00	3.00	5.67	15.00	0.00	16.33	3.00	0.00	10.33	149.46
Yupiit	74	74	74	M	Tuluksak K-12 School Fuel Tank Replacement	27.00	4.00	0.00	10.00	0.00	1.80	0.00	0.00	0.00	3.00	30.00	2.00	3.33	3.00	3.00	3.00	6.67	10.00	0.00	14.00	2.67	0.00	8.33	131.80

SCHOOL CAPITAL PROJECT FUNDING UNDER SB237

Excerpts from 2023 Report

Table 11 Grant Funding Summary by Fiscal Year

Fiscal Year	Construction	Participating Share Construction	Maintenance	Participating Share Maintenance
FY2011	$128,500,000	$2,622,449	$24,786,959	$9,332,278
FY2012	$61,910,901*	$1,263,488	$25,854,691	$1,537,425
FY2013	$62,230,515	$1,270,009	$17,979,185	$1,280,007
FY2014	$60,619,572	$1,237,133	$22,991,057*	$2,642,573
FY2015	$43,279,791	$1,262,301	$0	$0
FY2016	$43,237,400	$12,618,956	$2,623,689*	$53,545
FY2017	$72,877,968	$6,673,019	$0	$0
FY2018	$47,010,097	$811,667	$0*	$0
FY2019	$42,527,459	$867,907	$27,653,300*	$6,477,013
FY2020	$20,082,467*	$409,846	$7,365,723	$3,966,158
FY2021	$0	$0	$34,277*	$686
FY2022	$12,608,008	$256,028	$0	$0
FY2023	$91,745,168	$1,872,350	$47,384,214*	$9,389,091
Totals	**$686,629,346**	**$31,165,152**	**$176,673,095**	**$34,695,095**

Table 12 Total Funding Summary by Program

Program	Construction City/Borough	Construction REAA	Maintenance City/Borough	Maintenance REAA
Grant	$72,248,713	$522,635,465	$58,061,217	$71,227,664
Debt	$426,234,580	$0	$296,287,362	$0
Totals	**$498,483,293**	**$614,380,633**	**$385,067,934**	**$87,892,523**

Table 13 Total Funding Summary by Fiscal Year and Program

Program	Construction City/Borough	Construction REAA	Maintenance City/Borough	Maintenance REAA
FY2011 Grant	$0	$128,500,000	$21,821,504	$2,965,455
FY2011 Debt	$500,000	$0	$91,151,551	$0
FY2012 Grant	$0	$61,910,901*	$4,101,741	$21,752,950
FY2012 Debt	$316,064,997	$0	$83,915,625	$0
FY2013 Grant	$0	$62,230,515	$1,966,492	$16,012,693
FY2013 Debt	$66,473,304	$0	$12,051,696	$0
FY2014 Grant	$0	$60,619,572	$7,427,298	$15,563,759*
FY2014 Debt	$36,839,182	$0	$102,172,193	$0
FY2015 Grant	$11,762,891	$31,516,900	$0	$0
FY2015 Debt	$6,357,097	$0	$6,996,297	$0
FY2016 Grant	$43,237,400	$0	$0	$2,623,689*
FY2016 Debt	$0	$0	$0	$0
FY2017 Grant	$10,010,000	$62,867,968	$0	$0
FY2017 Debt	$0	$0	$0	$0
FY2018 Grant	$7,238,422	$39,771,675	$0*	$0*
FY2018 Debt	$0	$0	$0	$0
FY2019 Grant	$0*	$42,527,459*	$15,378,459	$12,274,841
FY2019 Debt	$0	$0	$0	$0
FY2020 Grant	$0	$20,082,467*	$7,365,723	$0
FY2020 Debt	$0	$0	$0	$0
FY2021 Grant	$0	$0	$0	$34,277*
FY2021 Debt	$0	$0	$0*	$0
FY2022 Grant	$0	$12,608,008	$0	$0
FY2022 Debt	$0	$0	$0*	$0
FY2023 Grant	$0	$91,745,168	$30,719,355*	$139,129,382*
FY2023 Debt	$0	$0	$0	$0
Totals	**$498,483,293**	**$614,380,633**	**$385,067,934**	**$87,892,523**

**Grant projects with funds approved before 7/1/2010 show the amount less the reappropriated money so that this report accurately represents funding only during the stated reporting period.*

*** Debt projects that were approved by the department after 7/1/2010, but funded with redirected funds from bonds authorized before 7/1/2010, were not included so that this report accurately represents funding only during the stated reporting period.*

Regional Education Attendance Area & Small Municipality Grant Fund (FU 1222) Balance

prepared by Finance & Support Services / Facilities as of **3-Apr-2023**

Deposits	**FY2013**	**FY2014**	**FY2015**	**FY2016**	**FY2017**	**FY2018**	**FY2019**	**FY2020**	**FY2021**	**FY2022**	**Supplement 2022 Approp**	**FY2023**	***Projected FY2024***	**Total**
REAA Fund Capitalization	35,512,300	35,200,000	39,921,078	38,789,000	31,230,000	40,640,000	39,661,000	19,694,500	-	17,119,000	83,962,500	32,784,000	*27,897,000*	442,410,378
Interest Earned (Actual as of 7/7/17)	118,206	368,142	383,180	-	-	-	-	-	-	-	-	-	-	869,528
Subtotal Deposits	35,630,506	35,568,142	40,304,258	38,789,000	31,230,000	40,640,000	39,661,000	19,694,500	-	17,119,000	83,962,500	32,784,000	*27,897,000*	443,279,906

REAA-funded Capital Project Funded Projects	**FY2013**	**FY2014**	**FY2015**	**FY2016**	**FY2017**	**FY2018**	**FY2019**	**FY2020**	**FY2021**	**FY2022**	**Supplement 2022 Approp**	**FY2023**	***Projected FY2024***	**Total**
Nightmute School Renovation/Addition	-	32,965,301	-	-	-	-	-	-	-	-	-	-	-	32,965,301
Kuinerramiut Elitnaurviate K-12 Renovation/Addition, Quinhagak	-	13,207,081	-	-	-	-	-	(5,041,059)	-	-	-	-	-	8,166,022
Kwethluk K-12 Replacement School	-	25,008,100	31,516,900	-	-	-	-	(10,000,000)	-	-	-	-	-	46,525,000
St. Mary's Andreafski High School Gym Construction	-	-	8,958,100	-	-	-	-	-	-	-	-	-	-	8,958,100
[see FU1080] Bethel Regional High School Multipurpose Addition	-	-	-	-	7,129,765	-	-	-	-	-	-	-	-	7,129,765
Lewis Angapak K-12 School Renovation/Addition, Tuntutuliak	-	-	-	-	40,343,416	704,620	-	-	-	-	-	-	-	41,048,036
Jimmy Huntington K-12 Renovation/Addition, Huslia	-	-	-	-	15,394,787	980,000	-	-	-	-	-	-	-	16,374,787
Shishmaref K-12 School Renovation/Addition	-	-	-	-	-	16,184,008	490,000	-	-	-	-	-	-	16,674,008
J Alexie Memorial K-12 School Replacement, Atmautluak	-	-	-	-	-	3,261,667	39,556,086	-	-	-	-	-	-	42,817,753
Auntie Mary Nicoli Elementary School Replacement, Aniak	-	-	-	-	-	18,641,380	-	-	-	-	-	-	-	18,641,380
Eek K-12 School Renovation/Addition	-	-	-	-	-	-	2,481,373	34,450,733	-	-	-	-	-	36,932,106
St. Mary's Campus Upgrades (1st MM project under HB 212)	-	-	-	-	-	-	3,449,928	-	*(53,908)*	-	-	-	-	3,396,020
Hollis K-12 School Replacement	-	-	-	-	-	-	-	672,793	-	9,476,008	-	-	-	10,148,801
St. Paul K-12 School Roof Replacement and Structural Repair (MM)									1,022,546	-	-	-	-	1,022,546
William N. Miller K-12 Memorial School Replacement, Napakiak											54,896,000	-	-	54,896,000
Kake Schools Heating Upgrades (MM)												191,618	-	191,618
Chenga Bay K-12 School Renovation (MM)												5,759,942	-	5,759,942
Copper River District Office Roof Replacement (MM)												581,556	-	581,556
Sheldon Point K-12 School Foundation Cooling & Repairs, Nunam Iqua (MM)												3,157,373	-	3,157,373
David-Louis Memorial K-12 School HVAC Control Upgrades, Grayling (MM)												113,750	-	113,750
Blackwell K-12 School Fire Alarm Upgrades, Anvik (MM)												79,975	-	79,975
Newtok K-12 School Relocation/Replacement, Mertarvik												25,000,000	*55,336,914*	80,336,914
Minto K-12 School Renovation/Addition												11,849,624	-	11,849,624
Subtotal Fund Activity	-	71,180,482	40,475,000	-	62,867,968	39,771,675	45,977,387	20,082,467	968,638	9,476,008	54,896,000	46,733,838	*55,336,914*	447,766,377
Lapsing or Reapprop'd Funds	-	-	-	-	-	-	-	(15,041,059)	(53,908)	-	-	-	-	(15,094,967)
Funded Projects	-	71,180,482	40,475,000	-	62,867,968	39,771,675	45,977,387	35,123,526	1,022,546	9,476,008	54,896,000	46,733,838	*55,336,914*	407,524,430
Reconciliation of Available REAA Funds:	**35,630,506**	**18,166**	**(152,576)**	**38,636,424**	**6,998,456**	**7,866,781**	**1,550,394**	**1,162,427**	**193,789**	**7,836,781**	**36,903,281**	**22,953,443**	***(4,486,471)***	

CIP Grant Requests and Funding History FY14 to FY24

	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024
CIP Grant Requests											
Total Applications	137	121	126	127	131	105	86	120	125	113	118
Percent of Districts Applying	66%	64%	66%	68%	70%	58%	51%	64%	57%	55%	55%
# Projects Reusing Scores	52	23	57	27	67	39	24	40	55	41	34
Major Maintenance	111	102	102	98	107	84	72	102	108	97	97
MM Total $ (*)	$253,682,082	$183,505,181	$172,195,526	$181,570,096	$164,887,094	$142,892,281	$113,787,100	$148,986,253	$187,285,413	$196,637,613	$217,866,788
School Construction	24	17	18	18	15	11	11	14	17	13	17
SC Total $ (*)	$284,133,432	$274,150,436	$230,920,120	$206,267,345	$123,294,419	$179,214,343	$190,238,739	$142,797,809	$162,305,916	$192,775,088	$195,666,783

Notes:
(*) Total $ is State Share

School Construction and Major Maintenance Funding											
MM Grant Funded	$38,169,529	$43,279,791	$13,491,192	$0	$7,851,952	$32,534,280 (1)	$7,365,723	$1,896,395 (1)	$0	$49,376,976 (1)	TBD
SC Grant Funded	$60,619,572	$0	$43,237,400	$74,715,471 (1)	$45,325,477 (1)	$50,131,111 (1)	$35,123,526 (1)	$0	$12,608,008 (1)	$91,745,168 (1)	TBD
Percent Grant $ Funded	18.4%	9.5%	14.1%	19.3%	18.5%	25.7%	14.0%	0.6%	3.6%	36.2%	0.0%
Percent Applications Funde	11.9%	1.7%	4.2%	3.4%	16.4%	25.3%	3.6%	0.9%	1.6%	21.8%	0.0%
Debt Projects	$138,622,000 (2)	$13,353,394 (2)	$0	$0	$0	$0	$0	$0	$0	$0	$0

Notes:
Grant Projects Funded includes all reappropriated or reallocated funding, including grant funding reported in prior fiscal years, as of December 19, 2022
(1) Includes AS 14.11.025 grants
(2) SB237 debt projects DEED & voter approved, effective 7/1/2010 - 12/31/2014

THE STATE of ALASKA
GOVERNOR MIKE DUNLEAVY

Department of Education & Early Development
FINANCE & SUPPORT SERVICES
PO Box 110500
Juneau, Alaska 99811-0500
Telephone: 907.465.6569

To: Bond Reimbursement & Grant Review Committee
From: School Facilities
Date: April 19, 2023

FY2025 CIP APPLICATION BRIEFING

Project Category Evaluation

As reported in the December department briefing to the committee, the treatment of playgrounds may be ripe for some 'redefinition' of category assignment parameters. Currently, under the application definitions, all playground related projects are treated as a Category "F", Improve Instructional Program, as an improvement to outdoor education. Now that there is a designated scoring element for playground codes on the Life Safety/Code & Protection of Structure Matrix, the department is requesting review by the committee on whether select playground projects that can qualify as a "major repair" (or replacement) and correct a code condition should continue to be placed on the school construction list or allowed to be categorized with the major maintenance projects.

The language of the CIP Application Instructions' Appendix A states:

> D. "Correct building code deficiencies that require major repair or rehabilitation in order for the facility to continue to be used for the educational program." This category, Building Code Deficiencies, was previously referred to as "Code Upgrade." The key words are "major repair." A "D" project corrects major building, fire, mechanical, electrical, environmental, disability (ADA), and other conditions required by codes. Work on individual facility systems may be combined into one project. However, the work on each system must be able to be independently justified and exceed $50,000. An example could be making all corridors one-hour rated. Making one or two toilet stalls accessible would not fit this category. In addition, no new space for unhoused students is permitted in this category, limiting its ability to be combined with other project types.
>
> F. "Modify or rehabilitate facilities for purpose of improving the instructional unit." Category "F", Improve Instructional Program, was previously referred to as "Functional Upgrade." This category is limited to changes or improvements within an existing facility such as, modifications for science programs, computer installation, conversion of space for special education classes, or increase of resource areas. It also covers improvements to outdoor education and site improvements to support the educational program.

In the past 4 cycles, applications for the following playground projects have been submitted:

1. Hoonah School Playground Improvements (Hoonah)
   Project scope installs new equipment and provides improvements to existing equipment and surfaces.
   Q.4a Scoring: Received points for Playground Code (existing deficiencies only) and ADA.

2. Playground Construction, 3 Schools (Yupiit)
   Project scope demolishes abandoned dilapidated equipment, makes improvements to the proposed playground areas, and installs new equipment.
   Q.4a Scoring: Received points for Playground Code (all scope)
3. Districtwide Playground Equipment and Surface Upgrades (Ketchikan)
   Project scope replaces existing equipment and fall surfaces.
   Q.4a Scoring: Received points for Playground Code (fall protection only)

No decision has to be made in connection with the FY2025 application, if the committee would like additional stakeholder input. Because of the difference in potential funding sources, without clear guidance, splitting playground projects between school construction and major maintenance could open up the process for reconsideration and appeal over which project category, and therefore which grant fund list, is appropriate.

Insurance Eligibility Criteria

Based on feedback from stakeholders, the department is proposing to combine the two questions in Section 2 Eligibility Requirements that relate to insurance submittals received by the department, typically outside of the CIP application process. One asks a yes/no question on whether evidence of required insurance has been submitted and one was a statement that the past five years of insurance replacement cost will be gathered (used for scoring of average expenditure on maintenance). As the two are directly related, it seems logical to combine the language.

Protection of Structure / Life Safety / Code Deficiencies

Matrix Scores

No changes are proposed to condition scores; however, based on feedback from stakeholders, the department is proposing minor wording edits for clarity. Specifically, adjusting the naming convention of conditions to better identify groupings of condition issues (e.g. “Plumbing”, “Roof”) where only the highest scoring supported condition will be assigned points. In support of this delineation, the department has suggested language to the matrix notes in the application. This has led to the following questions for committee consideration:

1. In the Mechanical section, should “HVAC age >40yr (15 pts)” be modified to a generic “Mechanical System”? What systems should “Mechanical System” include? Current interpretation of Mechanical System is to only Heating, Ventilation, and Plumbing in relation to the matrix and the notes. Should it also include Boilers and Controls, to complete the full listing of identified systems?
2. In the Electrical section, should “Intercom” be included in the “Electrical Systems , WO >5/yr (21pts)”; considering “Intercom Failure (10 pts)”, the department is suggesting this is the scoring cap for an Intercom condition. If each of the other system accumulated >5 WOs a year, the total points available would be 84. Department practice has been to provide the scoring combination with the most benefit to an application – if all Electrical Systems have a combined average WO meeting a higher scoring condition than individual non-WO supported condition, then the department assigns the highest points.

Alternate Weighting

The department is not proposing a modification to the method of weighting this scoring category for mixed scope projects. The method adopted for the FY2024 cycle appears to be working as desired, with no irregularities discovered.

Planning/Design

Additions are proposed to the "basic scope of work" items in Appendix C Capital Improvement Project Phases to conform to current regulation and department project agreement requirements. The department is proposing to add one new required item to Phase IIA Schematic Design for selection of a commissioning agent; this will be required only for project constructing new facilities or additions over 5,000 gross square feet (GSF), or performing a rehabilitation of a facility with over 10,000 GSF, which is consistent with regulation 4 AAC 31.080(j). This would not require any additional documentation, but be included information in Question 6g Planning and Design Team.

Non-scoring scope of work items, conforming to project agreement process and submittal requirements, are proposed to be added to Phase IIB Design Development: value analysis report and commissioning plan, and to Phase III Construction: commissioning report.

District Priority - Reuse Scoring

The department is seeking consideration of the preferred method of notifying a district that a request for reuse of an application that a reuse score will be modified by the department by any change in the district's ranking on the current six-year plan. The department is proposing a dual notification approach: in the Application Instructions, language could be added in Question 3a, additionally, the department provides a template letter for requesting reuse of scores, which can be amended to clarify this practice.

Application Copies

In the initial "*Preparing and Submitting This Application*" section, the application states "submit one original and three complete copies of this application (four total applications)". Due to the pandemic consideration, for the FY2022 CIP application submitted in 2020, the department allowed electronic signatures to be submitted with the application in lieu of an original signature. Particularly for applications prepared outside of the district, this electronic signature option has become the norm over the past two cycles.

The department is seeking feedback from the committee on whether to amend the application to remove the requirement for an "original" signature application and revise the application to "submit four complete copies of this application". If that is the case, should additional language in the Application Instructions be added under "Authorizing Signature": "The application must be signed by the appropriate official with an original or certified electronic signature."

After internal review of business needs and archive retention requirements, the department is supportive of amending the "one original and three complete copies of this application" requirement to one hard copy application and one electronic application, with the same requirement for all attachments. This simplifies tracking the number of copies of the application and attachments and will be a cost savings to the districts in application preparation. The majority of district applications already use the option to provide a single hard copy attachment and an electronic file.

Summary of Changes: FY2025 CIP Application & Instructions

Question	Application	Instructions	Guidelines for Raters; Eligibility Checklist; Scoring Forms	Magnitude of Change
Prep		Expanded example of "type of school".		Minor
Prep	Application "original" and "number of copies"	Review language to specify "original or certified electronic signature"		**Moderate / Major**
Q.2c,2f	Reorder and combine language of Q.2f with Q.2c, both relating to insurance.	Combine language of Q.2f with Q.2c, both relating to insurance.	No conforming changes required.	**Moderate**
Q.3a		Add language clarifying process for reuse of scores.		Minor
Q.3d		Add language that scope should include information on ASHRAE 90.1 conformance.		Minor
Q.4a	Conform condition naming to Rater's Guide; add language specifying conditions with superseding points.	Add language that only highest scoring condition will receive points.	Adjust condition naming	Minor
Q.5j		Add language to confirm consistency with Q. 3c (demolition, transition plan). Provided instruction on calculation.		Minor
Q.6g		Add language to include consultants for value analysis or commissioning agent.		Minor
Q.9g			Corrective edit from FY2024	Minor
Q.9i		Add Facility Condition Index (FCI) definition/calculation.		Minor
Attachments	Conform language to Prep section, regarding number and type of copies			**Moderate**
Appx C		Add basic scope of effort items. Add selection of CxA to Schematic scoring requirements.		**Moderate / Major**

Application for Funding
Capital Improvement Project by Grant
or
State Aid for Debt Retirement

FY2025

PREPARING & SUBMITTING THIS APPLICATION

For each funding request, submit ~~**one original** and **three**~~**one** **complete** ~~**copies**~~ **hardcopy**, bound or in a binder, and **one complete electronic copy** **of this application** ~~**(four total applications)**~~ **and** ~~**two copies of**~~ **each attachment**. ~~Attachments can be provided in a single copy if electronic files of the attachments are also provided in a portable document file (pdf) format.~~ PDF files of all documents ~~are requested but not~~is required; provide on a compact disc (CD) or USB flash drive. The grant application deadline is September 1st.

When answering application questions, provide verifiable supporting documentation. Answers that cannot be verified will be considered unsubstantiated and may result in the department finding the application ineligible due to incompleteness.

The department will only score ten project applications from each district during a single rating period. In addition, a district can submit a letter to request reuse of an application's score for one year after the application was filed; or, if the project was substantially complete at the time of the application, the district can request reuse of the application's score for up to five years after the application was filed.

For instructions on completing this application, please refer to the department's Capital Improvement Project Application and Support webpage (education.alaska.gov/facilities/FacilitiesCIP.html).

PROJECT INFORMATION

School District: _____

Community: _____

School Name: _____

Project Name: _____

CERTIFICATION

I hereby certify that this information is true and correct to the best of my knowledge, and that the application has been prepared under the direction of the district school board and is submitted in accordance with law.

Superintendent or Chief School Administrator Date

SEC. 1. CATEGORY OF FUNDING AND PROJECT TYPE

1a. Type of funding requested. Choose only **one** funding source.

☐ Grant Funding ☐ Aid for Debt Retirement (Bonding)

1b. Primary purpose of project. Choose only **one** category. The department will change a project category as necessary to reflect the primary purpose of the project.[1]

School Construction (AS 14.11.135(6)):
- ☐ Health and life-safety (Category A)
- ☐ Unhoused students (Category B)
- ☐ Improve instructional program (Category F)

Major Maintenance (AS 14.11.135(7)):
- ☐ Protection of structure (Category C)[2]
- ☐ Building code deficiencies (Category D)
- ☐ Achieve operating cost savings (Category E)

1c. Phases of project to be covered by this funding request. Indicate **all** applicable phases:

☐ Planning (Phase I) ☐ Design (Phase II) ☐ Construction (Phase III)

SEC. 2. ELIGIBILITY REQUIREMENTS TO SUBMIT AN APPLICATION

Questions 2a-2e require a "yes" response, with substantiating documentation as necessary, in order to be eligible for review and rating.

2a. Has a six-year Capital Improvement Plan (CIP) been approved by the district school board? ☐ yes ☐ no

(Refer to AS 14.11.011(b), and 4 AAC 31.011(c); attach a copy of the 6-year plan.)

2b. Does the school district have a functional fixed asset inventory system? ☐ yes ☐ no

2c. Has evidence of required insurance been submitted as required to the department *or* is~~Is~~ evidence ~~of required insurance~~ attached to this application ~~*or has evidence been submitted as required to the department*~~? ☐ yes ☐ no

Districtwide replacement cost insurance for the last five years will be gathered by the department from annual insurance certification and schedule of values.

[1] The department's authority to assign a project to its correct category is established in AS 14.11.013(c)(1) and in AS 14.11.013(a)(1) under its obligation to verify a project meets the criteria established by the Bond Reimbursement & Grant Review Committee under AS 14.11.014(b).

[2] AS 14.11.100(j)(4), authorizing debt reimbursement project needs, does not expressly allow a primary purpose of protection of structure.

2d. Is the project a capital improvement project and not part of a preventive maintenance program or custodial care? ☐ yes ☐ no

(Supporting evidence must be outlined in the project description, question 3d.Reference AS 14.11.011(b)(3))

2e. Is the district's preventive maintenance program certified by the department? ☐ yes ☐ no

~~**2f.** Districtwide replacement cost insurance for the last five years will be gathered by the department from annual insurance certification and schedule of values.~~

SEC. 3. PROJECT INFORMATION

3a. Priority assigned by the district. (Up to 30 points)
What is the rank of this project under the district's six-year Capital Improvement Plan?

Rank: _____

3b. School facilities within scope (Up to 30 points)
What buildings or building portion (i.e., original building or addition) will be included in the scope of work of the project? (Add additional rows as needed to include all affected buildings or building portions.)

(The department will utilize GSF records to establish project points (up to 30) in the "Weighted Average Age of Facilities" scoring element. For facility number, name, year, and size information on record, refer to the DEED Facilities Database (education.alaska.gov/Facilities/SchoolFacilityReport/SearchforSchoolFac.cfm).

DEED Facility #	Building or Building Portion	Year Built	GSF
TOTAL GSF			

3c. Facility status. Does this project change the status of any facility within the project scope to one of the below? The existing building(s) will be (check all that apply):

☐ renovated ☐ added to ☐ demolished ☐ surplused ☐ other

NOTE: If the project changes the current status of a facility to "demolished" or "surplused," a transition plan is required as part of this application. For state-owned or state-leased facilities, the transition plan should describe how surplused facilities will be secured and maintained during transition. See instructions.

3d. Project description/Scope of work. The project description and scope of work narratives are a required elements of this application (Reference AS 14.11.013(c)(3)(A)). Ensure project aligns with selected funding category.

Project description

In the space below, provide a clear, detailed description of the project. At a minimum, include the following:

- Facilities impacted by the project
- Age of facility/system(s)
- Facility/system conditions requiring capital improvement
- Explain why this project is not preventive maintenance
- Other discussion describing project

Scope of work

In the space below, provide a clear, detailed, and itemized description of the scope of work that addresses the items in the project description. At a minimum, include the following:

- Work items to be completed with this project
- Work items already completed (if any)
- Other discussion pertaining to scope of work

3e. Project schedule. Provide estimated or actual dates for the following project milestones.

Estimated receipt of funding date _____

Contract with design team _____

Begin design _____

Design work 100% complete _____

Project out to bid _____

Begin construction _____

Complete construction _____

Provide additional information regarding the project schedule, if needed (including whether an alternative project delivery method is anticipated).

3f. Is the work identified in this project request partially or fully complete? ☐ yes ☐ no

If the answer is yes, attach 2 copies of documentation that establishes compliance with the department's requirements for bids and awards of construction contracts. (Reference 4 AAC 31.080)

Provide DEED recovery of funds project number: # _____

3g. Will this project require acquisition of additional land or utilization of a new school site? ☐ yes ☐ no

If the answer is yes, attach site description or site requirements. If a new site has been identified, attach the site selection analysis used to select the new site. Note the attachment on the last page of the application.

3h. If the project is a multiple-school or districtwide project, provide justification for cost-effectiveness and how the district intends to award as a single contract.

SEC. 4. CODE DEFICIENCY / PROTECTION OF STRUCTURE / LIFE SAFETY

4a. Code deficiency / Protection of structure / Life safety (Up to 50 points)

Describe in detail the issue, impact, and severity of code deficiency, protection of structure, and/or life safety conditions; attach supporting documentation. Check the box of the specific scoring conditions corrected by the scope of the project and where the supporting documentation is located in the attachments.

NOTE: Code violations documented and cited by the appropriate qualified entity or enforcement authority may receive a 3 pt increase. See Guidelines for Raters.

Structural

- ☐ Seismic - no restrictions (3 pts)
- ☐ Foundation/Floor - no PE eval (4 pts)
- ☐ Seismic - minimal restrictions (6 pts)
- ☐ Upper Floor Structure - no PE eval (9 pts)
- ☐ Vertical Structure - no PE eval (9 pts)
- ☐ Roof Structure - no PE eval (10 pts)
- ☐ Foundation/Floor – PE eval (15 pts)
- ☐ Seismic - moderate restriction (15 pts)
- ☐ Upper Floor Structure - PE eval (20 pts)
- ☐ Vertical Structure – PE eval (20 pts)
- ☐ Roof Structure - PE eval (24 pts)
- ☐ Seismic~~/Gravity~~ Partial Closure (28 pts unless does not qualify for space, then 15 pts)
- ☐ Seismic~~/Gravity~~ Full Closure (50 pts unless does not qualify for space, then 15 pts)

NOTE: Categories for which only the highest scoring supported condition will be assigned points: Seismic, Foundation/Floor, Upper Floor Structure, Vertical Structure, and Roof Structure.

Provide description of structural-related conditions and specific references to title and page of support documents.

Roof/Envelope

- ☐ Siding Failure, age <25yr (2 pts)
- ☐ Siding Finish (2 pts)
- ☐ Doors, age >20yr (3 pts)
- ☐ Roof, age >Warranty +5yr (3 pts)
- ☐ Roof, age ≥Warranty +10yr (6 pts)
- ☐ Roof Leaks, ~~avg~~ WO <3/yr (8 pts)
- ☐ ASHRAE 90.1 Windows (8 pts)
- ☐ ASHRAE 90.1 Insulation (10 pts)
- ☐ Siding, age >25yr (12 pts)
- ☐ Windows, age >30yrs (12 pts)
- ☐ Siding Failure, age >25yr (15 pts)
- ☐ Roof Leaks, ~~avg~~ WO >3/yr (15 pts)
- ☐ Doors w/Egress issues (15 pts)
- ☐ Roof Leaks affect space, with WOs (25 pts)

NOTE: Categories for which only the highest scoring supported condition will be assigned points: Siding, Doors, and Roof. If condition is based on an average number of work orders per year ("~~avg~~ WO"), provide work orders. Average is over prior three years. See application instructions. Violations documented and cited by the appropriate qualified entity or enforcement authority may receive a 3 pt increase. If condition is based on ASHRAE 90.1 code deficiency, provide existing R-value or code violation of system.

Provide description of roof or building envelope-related conditions and specific references to title and page of support documents.

Architectural/Interior/ADA

ADA - 1 category (1 pts)	☐	Elevator Issues (3 pts)	☐
ADA - 2 categories (2 pts)	☐	ADA - 4 categories (4 pts)	☐
DEC Sanitation (2 pts)	☐	Floor Finishes >15yr (4 pts)	☐
ADA - 3 categories (3 pts)	☐	Elevator Violations (7 pts)	☐
Ceiling Finishes age >25yr (3 pts)	☐	Building Egress (10 pts)	☐
Wall Finishes age >25yr (3 pts)	☐	Rated Assemblies (12 pts)	☐

NOTE: Categories for which only the highest scoring supported condition will be assigned points: ADA and Elevator.

Provide description of architectural, interior, or ADA-related conditions and specific references to title and page of support documents.

Mechanical

Controls, DDC Deficiency (3 pts)	☐	Heating, WO >3/yr (11 pts)	☐
Mech. System Narrative, ~~System~~ age >30yr (4 pts)	☐	~~Codes:~~ Ventilation, Codes (12 pts)	☐
Ventilation, WO <3/yr (5 pts)	☐	~~Codes:~~ Plumbing, Codes (12 pts)	☐
Plumbing, WO <3/yr (6 pts)	☐	~~Codes:~~ Heating, Codes (13 pts)	☐
Heating, WO <3/yr (7 pts)	☐	Boilers, 1 of 2 Non-op (13 pts)	☐
~~Pneumatic~~ Controls, Pneumatic (8 pts)	☐	HVAC age >40yr (15 pts)	☐
Ventilation, WO >3/yr (9 pts)	☐	Boilers, 2 of 3 Non-op (18 pts)	☐
Plumbing, WO >3/yr (10 pts)	☐	Mechanical System~~s~~, WO >5/yr (21 pts)	☐
		Heating Failure (25 pts)	☐

NOTE: Categories for which only the highest scoring supported condition will be assigned points: Boilers, Controls, Heating, Plumbing, and Ventilation. "Mechanical System" may be inclusive of Heating, Plumbing, or Ventilation with regard to narrative age or work orders per year. If condition is based on an average number of work orders per year ("~~avg~~ WO"), provide work orders. Average is over prior three years. See application instructions.

Provide description of mechanical-related conditions and specific references to title and page of support documents.

Electrical

Lighting, Narrative, ~~Lighting~~ age >25yr (2 pts)	☐	Egress/EM lights, WO >3/yr (8 pts)	☐
		Intercom Issues, WO >3/yr (8 pts)	☐
~~Narrative,~~ Electrical, Narrative, age >30yr (4 pts)	☐	~~Codes,~~ Lighting, Codes (10 pts)	☐
		~~Codes,~~ Power, Codes (10 pts)	☐
Power, WO <3/yr (4 pts)	☐	Intercom Failure (10 pts)	☐
Lighting, WO <3/yr (4 pts)	☐	Electrical, age >40yr (15 pts)	☐
Egress/EM lights, WO <3/yr (5 pts)	☐	Lighting, Levels~~,~~ < 50% of code (16 pts)	☐
Back-up Generator In-operable (5 pts)	☐	Electrical System~~s~~, WO >5/yr (21 pts)	☐
Power, WO >3/yr (7 pts)	☐	Power Failure (25 pts)	☐
Lighting, WO >3/yr (7 pts)	☐		

NOTE: Categories for which only the highest scoring supported Electrical System condition will be assigned points: Egress/EM Lights, Electrical, Intercom, Lighting, and Power. Max Intercom condition is Failure. If condition is based on an average number of work orders per year (“avg WO”), provide work orders. Average is over prior three years. See application instructions.

Provide description of electrical-related conditions and specific references to title and page of support documents.

Fire Alarm/Sprinkler

- ☐ Narrative, Fire Alarm, Narrative, age >15yr (2 pts)
- ☐ Narrative, Sprinkler, Narrative, >30yr (2 pts)
- ☐ Sprinkler Heads Failing, age >30yr (5 pts)
- ☐ Sprinkler Coverage Gaps (5 pts)
- ☐ Fire Alarm, Non-addressable Fire Alarm (6 pts)
- ☐ Fire Alarm/Sprinkler, WO >1/yr (8 pts)
- ☐ Sprinkler Heads Failing, age >40yr (10 pts)
- ☐ Fire Alarm/Sprinkler, WO >3/yr (15 pts)
- ☐ Fire Alarm Non-op, <3 floors (17 pts)
- ☐ Fire Alarm/Sprinkler, WO >5/yr (20 pts)
- ☐ Fire Alarm Non-op, >3 floors (25 pts)
- ☐ Sprinkler Non-op (30 pts)

NOTE: Categories for which only the highest scoring supported condition will be assigned points: Fire Alarm and Sprinkler. If condition is based on an average number of work orders per year (“avg WO”), provide work orders. Average is over prior three years. See application instructions.

Provide description of fire alarm or sprinkler-related conditions and specific references to title and page of support documents.

Site

- ☐ Vehicle Surfaces (3 pts)
- ☐ Walkways and Surfaces (4 pts)
- ☐ Drainage Issues (6 pts)
- ☐ Playground Code (12 pts)
- ☐ Power Issues (15 pts)
- ☐ Wastewater Issues (15 pts)
- ☐ Water Issues (16 pts)
- ☐ Wastewater Failure (24 pts)
- ☐ Water Failure (25 pts)

NOTE: Categories for which only the highest scoring supported condition will be assigned points: Water and Wastewater.

Provide description of site-related conditions and specific references to title and page of support documents.

UST/AST/HazMat

- ☐ HazMat (all) Low Exposures (3 pts)
- ☐ UST, Narrative, UST age >30yr (2 pts)
- ☐ AST, Narrative, AST age >40yr (5 pts)
- ☐ Sewage Lagoon Failure/Exposure (5 pts)
- ☐ UST/AST Leak (7 pts)
- ☐ UST/AST USCG/40 CFR Cite (10 pts)
- ☐ HazMat (all) Mod Exposures (10 pts)
- ☐ HazMat (all) High Exposures (22 pts)

NOTE: Categories for which only the highest scoring supported condition will be assigned points: AST, HazMat, and UST.

Provide description of UST, AST, or HazMat-related conditions and specific references to title and page of support documents.

SEC. 5. REQUIREMENTS FOR SPACE TO BE ADDED OR REPLACED

NOTE: If this project is classified as Major Maintenance (Category C, D, or E) and is not including any new space, skip to 5j. **All applications requesting new or replacement space, or classified as School Construction (Category A, B, or F), must provide the information requested in this section.** For the purposes of this section, gross square footage is calculated in accordance with 4 AAC 31.020(e). Worksheets to be completed are available at the department's website at: Education.Alaska.Gov/facilities/FacilitiesCIP.html

5a. Indicate the student grade levels to be housed in the proposed project facility: _____

5b. Is there any work (other than this project) within the attendance area that has been approved by local voters, or has been funded, or is in progress that houses any student grade levels included in the proposed project? ☐ yes ☐ no

If the answer is yes, in the table below, identify the project and provide information about size, grades to be served, and student capacity.

Project Name	GSF	Grades	Student Capacity

5c. Are there school facilities within the attendance area that house any student grade levels included in the proposed project? ☐ yes ☐ no

If the answer is yes, in the table below, identify the school and provide information about size, grades served, and student capacity.

School Name	GSF	Grades	Student Capacity

In lieu of data in the format above for questions 5b and 5c, we are providing detailed attachments. ☐ yes ☐ no

5d. What is the anticipated date of occupancy for the proposed facility? _____

5e. Unhoused students (Up to 80 points)

In the table below, provide the attendance area's current and projected ADM:

Table 5.1 ATTENDANCE AREA ADM			
School Year	**K-6 ADM**	**7-12 ADM**	**Total ADM**
2022-2023			
2023-2024			
2024-2025			
2025-2026			
2026-2027			
2027-2028			
2028-2029			
2029-2030			
2030-2031			
2031-2032			

5f. Were the ADM projections used by the district based on the department's worksheets? ☐ yes ☐ no

Attach calculations and justifications.

5g. Confirm space eligibility:

Total Existing SF _____
Remaining Existing SF _____
Total Eligible SF _____
Qualifies for _____ additional SF
Applying for _____ additional SF

5h. Regional community facilities (Up to 5 points)

List below any alternative regional, community, and school facilities in the area that are capable of meeting all, or part, of the project needs. Identify the facility by name, its condition, and provide the distance from current school. If attached documentation is intended to address this question, note the attachment on the last page of the application.

5i. Are educational specifications attached? ☐ yes ☐ no

ALL PROJECTS CONTINUE FROM THIS POINT

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

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

Table 5.2 PROJECT SPACE EQUATION

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

SEC. 6: PROJECT PLANNING & DESIGN

NOTE: Reference Appendix B of the instructions for required elements. More developed design documents can be attached in lieu of previous documents.

6a. Condition/Component survey (0 to 10 points)

1. Is a facility or component condition survey attached? ☐ yes ☐ no

   Document title: _____

   Date prepared: _____

6b. Use of prior school design (up to 10 points)

1. Is the district proposing to use a previously department-approved school construction design for this project? ☐ yes ☐ no
2. If yes, in addition to the space eligibility analysis in Section 5, has the district attached design plans and a cost analysis that includes both design and construction costs demonstrating how the use will result in cost savings for the project? ☐ yes ☐ no

6c. Use of building system design standard (up to 10 points; 2 points per qualified system)

1. Is the district proposing to use one or more previously approved building system design standard for this project? ☐ yes ☐ no
2. If yes, provide supporting documentation on each specific system showing that the building system(s) conform to a published district or municipal building standard.

6d. Planning/Concept design (0 or 10 points, all elements required for 10 points)

1. Has an architectural or engineering consultant been selected (as required)? ☐ yes ☐ no
2. Are concept design studies/planning cost estimates attached? ☐ yes ☐ no
3. New construction projects: are educational specifications, site selection analysis, and student population projections attached (as required)? ☐ yes ☐ no

6e. Schematic design - 35% (0 or 10 points, all elements required for 10 points as applicable to the project)

1. Are complete schematic design documents attached? Schematic design documents include approximate dimensioned site plans, floor plans, elevations, and engineering narratives for all necessary disciplines. If the answer is no and project is complete, provide a justification for why documents are not needed. ☐ yes ☐ no
2. Is a schematic design level cost estimate attached? ☐ yes ☐ no

6f. Design development - 65% (0 or 5 points, all elements required for 5 points as applicable to the project)

1. Are design development documents attached? Design development documents include dimensioned site plans, floor plans, complete exterior elevations, draft technical specifications and engineering plans. If the answer is no and project is complete, provide justification as to why documents are not needed. ☐ yes ☐ no
2. Is a design development cost estimate attached? ☐ yes ☐ no

6g. Planning/Design team List parties who have contributed to the evaluation and/or design services thus far for this project. When applicable, a district employee with special expertise should be listed, along with the basis for his or her expertise.

Provider	Expertise

SEC. 7: COST ESTIMATE

Cost estimate for total project cost (Up to 30 points)

7a. Project cost estimate Complete the following tables using the Department of Education & Early Development's current Cost Model edition or an equivalent cost estimate. Completion of the tables is mandatory.

Percentages are based on construction cost. See Appendix C for additional information. If the project exceeds the recommended percentages, provide a detailed justification for each item exceeding the percentage. The total of all additive percentages should not exceed 130%. If the additive percentages exceed 130%, a detailed explanation must be provided or the department will adjust the percentages to meet the individual and overall percentage guidelines.

Table 7.1. TOTAL PROJECT COST ESTIMATE

Project Budget Category	Maximum % without justification	I Prior AS 14.11 Funding	II Current Project Request	III % of Total Construction Cost	IV Project Total
CM - By Consultant [1]	2 - 4%				
Land [2]	n/a				
Site Investigation [2]	n/a				
Seismic Hazard [3]	n/a				
Design Services	6 - 10%				
Construction [4]	n/a				
Equipment & Technology [2,5]	up to 4%				
District Administrative Overhead [6]	up to 9%				
Art [7]	0.5% or 1%				
Project Contingency	5%				
Project Total	**up to 130%**				

1. Percentage is established by AS 14.11.020(c) for consultant contracts (Maximum allowed percentage by total project cost: $0-$500,000 – 4%; $500,001- $5,000,000 – 3%; over $5,000,000 – 2%).
2. Include only if necessary for completion of this project; address need in the project description (Question 3d). Amounts included for Land and Site Investigation costs need to be supported in the cost estimate discussion (Question 7c), and supporting documentation should be provided in the attachments.
3. Costs associated with assessment, design, design review, and special construction inspection services associated with seismic hazard mitigation of a school facility. This amount needs to be provided by a design consultant, and should not be estimated based on project percentage.
4. Attach detailed construction cost estimate and life cycle cost if project is new-in-lieu-of-renovation.
5. Equipment and technology costs should be calculated based on the number of students to be served by the project. See the department's publication, *Guidelines for School Equipment Purchases* for calculation methodology (2016). Technology is included with Equipment.
6. Includes district/municipal/borough administrative costs necessary for the administration of this project (for maximum indirect percentage based on project cost, see 4 AAC 31.023); this budget line will also include any in-house construction management cost, reduced for CM percentage.
7. Only required for renovation and construction projects over $250,000 that require an Educational Specification (AS 35.27.020(d)).

Table 7.2 CONSTRUCTION COST ESTIMATE						
	New Construction			Renovation		
Construction Category	Cost	GSF	Unit Cost	Cost	GSF	Unit Cost
Base Building Construction [1]						
Special Requirements [2]		n/a			n/a	
Sitework and Utilities		n/a			n/a	
General Requirements		n/a			n/a	
Geographic Cost Factor		n/a			n/a	
Size/Dollar Adj. Factor		n/a			n/a	
Contingency		n/a			n/a	
Escalation		n/a			n/a	
Construction Total						

1. If using the Cost Model, Base Construction is equal to Divisions (1.0+2.0) for new construction, and Division 11.00 for Renovation, otherwise, Base Construction is equal to the total construction cost less the costs that correspond with other cost categories in the table.
2. Explain in detail and justify special requirements in Question 7c.

7b. Cost estimate source. Identify and describe as needed the specific source of the costs provided in Table 7.1 (e.g. professional estimators, solicited vendor quotes, paid invoices).

7c. Cost estimate discussion & justifications. Identify and explain cost estimate assumptions, lump sums, and percentages in excess of the recommended percentages in Table 7.1. Provide a detailed justification for each item exceeding a recommended percentage.

SEC. 8: ADDITIONAL PROJECT FACTORS

Emergency conditions are those that pose a high level of threat for building use by occupants.

8a Is this project an emergency? (Up to 50 points) ☐ yes ☐ no

Has the district submitted an insurance claim? ☐ yes ☐ no
If no, explain below.

If the project is an emergency, describe below in detail the nature, impact, and immediacy of the emergency and actions the district has taken to mitigate the emergency conditions.

Categorize the issues described and explained above by checking the boxes that apply to the building condition(s).

Category of Conditions	Applicable
Building is destroyed or rendered functionally unsafe for occupancy and requires the building to be demolished and rebuilt. (50 points)	☐
Building is unsafe and the entire student population is temporarily unhoused. The building requires substantial repairs to be made safe for the student population to occupy the building. (25-45 points)	☐
Building is occupied by the student population. A local or state official has issued an order that the building will need to be repaired by a certain date or the district will have to vacate the building. (5-25 points)	☐
A portion of the building requires significant repair or replacement of damaged portion of building. The damaged portion of the building cannot be used for educational purposes. (5-45 points)	☐
A major building component or system has completely failed and is no longer repairable. The failed system or component has rendered the facility unusable to the student population until replaced. (25-45 points)	☐
A major building component or system has a high probability of completely failing in the near future. The component or system has failed, but has been repaired and may have limited functionality. If the component fails, the district may be required to restrict use of the building until the component or system is repaired or replaced. (5-25 points)	☐

8b. Inadequacies of existing space (Up to 40 points)

Describe how the inadequacies of the existing space impact mandated instructional programs or existing or proposed local programs and how the project will improve the existing facilities to support the instructional programs.

8c. Other options (Up to 25 points)

Describe, in addition to the proposed project, at least two or more viable and realistic options that have been considered in the planning and development of this project to address the best solution for the facility.

Major maintenance projects should include consideration of project design options, material or component options, phasing, cost comparisons, or other considerations.

New school construction or addition/replacement of space projects should include a discussion of existing building renovation versus new construction, acquisition or use of alternative facilities, a life cycle cost analysis and cost benefit analysis, service area boundary changes where there are adjacent attendance areas, or other considerations.

8d. Annual operating cost savings (Up to 30 points)

Quantify the project's annual operational cost savings, if any, in relation to the project total cost.

8e. Phased funding (Up to 30 points)

Provide AS 14.11 administered grants that have been appropriated by the legislature as partial funding in support of this project. This category is score-able only in instances where project funding was intentionally phased.

Applications seeking funds for cost overages, change in scope, or other actions not noted in the original application or legislative appropriation will not be considered eligible for these points.

DEED grant #: _____

8f. Is the district applying for a waiver of participating share? ☐ yes ☐ no

Only municipal districts with a full value per ADM less than $200,000 are eligible to apply for a waiver of participating share. REAA's are not eligible to request a waiver of participating share.

(If the district is applying for a waiver, attach justification. Refer to AS 14.11.008(d) and Appendix F of the application instructions.)

SEC. 9. DISTRICT PREVENTIVE MAINTENANCE & FACILITY MANAGEMENT

District preventive maintenance and facility management (60 points possible)

Ensure that documents related to the district's maintenance and facility management program have been provided with district CIP submittals. Include management reports, renewal and replacement schedules, work orders, energy reports, training schedules, custodial activities, and any other documentation that will enhance the requirements listed in the instructions; these are district eligibility attachments, only two copies are required regardless of the number of applications submitted by the district. Include the following documents:

9a. Maintenance Management Narrative (Up to 5 Evaluative Points)

9b. Maintenance Labor Reports (Up to 15 Formula-Driven Points)

9c. PM/Corrective Maintenance Reports (Up to 10 Formula-Driven Points)

9d. 5-Year Average Expenditure on Maintenance. Districtwide maintenance expenditures for the last 5 years will be gathered by the department from audited financial statements. (Up to 5 Formula-Driven Points)

9e. Energy Management Narrative (Up to 5 Evaluative Points)

9f. Energy Consumption Reports (Up to 5 Formula-Driven Points)

9g. Custodial Narrative (Up to 5 Evaluative Points)

9h. Maintenance Training Narrative (Up to 5 Evaluative Points)

9i. Capital Planning Narrative (Up to 5 Evaluative Points)

SEC. 10. DISTRICT CONTACT INFORMATION

The department has the authority to determine a project eligibility, change a project's primary purpose, and modify a project's scope and budget. If a change is made, the department will notify the Superintendent or Chief School Administrator of the district.

The district may request the department include the following additional persons (up to three) in the correspondence regarding changes to this project application:

Name	E-mail

ATTACHMENTS CHECKLIST

Note all attachments included with the application. Each a~~A~~ttachment~~s can~~ must be provided in a single hardcopy ~~if~~ and an electronic file~~s of the attachments are also provided~~ in a portable document file (pdf) format.

Project eligibility attachments: Eligibility item is required on all projects. ~~Submit two copies, regardless of the number of project applications.~~

- ☐ Six-year Capital Improvement Plan (CIP) (question 2a)

District eligibility attachments: ~~Submit two copies, regardless of the number of project applications.~~

- ☐ Preventive maintenance and facility management narratives and supplemental documents: sample work orders, custodial plan(s), training schedules and logs, renewal and replacement schedules (questions 9a, 9e, 9g-9i)
- ☐ Preventive maintenance reports (questions 9b, 9c, 9f)

Project description attachments: List all attachments referred to or noted in the application. Some items may not be applicable to a specific project. ~~Submit two copies of each attachment with application.~~

- ☐ Transition plan for state-owned or state-leased properties (question 3c)
- ☐ Alternative project delivery request or approval; solicitation documents (question 3e)
- ☐ For fully or partially completed projects: documentation establishing compliance with 4 AAC 31.080, including solicitation documents (question 3f)
- ☐ Site description, site requirements, and/or site selection analysis (question 3g)
- ☐ Condition support documents *(e.g., maintenance work orders, warranties, etc.)* (question 4a)
- ☐ Facility condition survey (question 6a)
- ☐ Published district building system design standard (question 6c)
- ☐ Facility appraisal (question 6d)
- ☐ Educational specification (question 5i, 6d)
- ☐ Concept design documentation (question 6d)
- ☐ Schematic design documentation (question 6e)
- ☐ Design development documentation (question 6f)
- ☐ Cost estimate worksheets (question 7a)
- ☐ Appropriate compliance reports *(i.e., Fire Marshal, AHERA, ADA, etc.)* (questions 4a, 8a)
- ☐ Cost/benefit analysis (questions 8c, 8d)
- ☐ Life cycle cost analysis (questions 8c, 8d)
- ☐ Value analysis (questions 8c, 8d)
- ☐ Justification for waiver of participating share (question 8f)
- ☐ Capacity calculations of affected schools in the attendance area/areas (question 5e)
- ☐ Enrollment projections and calculations (question 5e)
- ☐ Other:_____ _____

Instructions for completing the Application for Funding for a Capital Improvement Project

FY2025

These instructions support DEED Form #05-22-043
Application for Funding Capital Improvement Project by Grant or State Aid for Debt Retirement.

PREPARING & SUBMITTING THIS APPLICATION

Answer all questions: Each question on the application form must be answered in order for the application to be considered complete. **Only complete applications will be accepted. Incomplete applications will be considered ineligible and returned unranked**. If a question is not applicable, please note as NA. The department has the authority to reject applications due to incomplete information or documentation provided by the district. The grant application deadline is September 1st (postmarked or shipped on or before September 1st is acceptable).

Project name to be accurate and consistent: The project name on the first page of the application should be consistent with project titles approved by the district school board and submitted with the six-year Capital Improvement Plan (CIP). The project name should begin with the name of the school and type of school (ex: K-12 School, High School). Multi-school projects should list the schools that are part of the scope unless the work is districtwide at most or all school sites in the district.

Limited to ten applications: The department will only score up to ten individual project applications from each district during a single rating period. In addition, a district can submit a letter to request reuse of an application's score for one year after the application was filed; or, if the project was substantially complete at the time of the application, the district can request reuse of the application's score for up to five years after the application was filed.

The department may adjust parts of the application: Project scope and budget may be altered based on the department's review and evaluation of the application. The department will correct errors noted in the application and make necessary increases or decreases to the project budget. The department may decrease the project scope, but will not increase the project scope beyond that requested in the original application submitted by the September 1st deadline.

Authorizing signature: The application must be signed by the appropriate official. Unsigned applications cannot be accepted for ranking.

Application packages should be submitted to:
Alaska Department of Education & Early Development
Division of Finance & Support Services, Facilities

Mailing Address
P.O. Box 110500
Juneau, AK 99811-0500

Physical Deliveries
333 Willoughby Avenue, 9th Floor
Juneau, AK 99811-0500

For further information contact:
School Facilities Manager

1. CATEGORY OF FUNDING AND PROJECT TYPE

1a. Type of funding requested.

Check **one** box to indicate which type of state aid is being requested.

Grant Funding: applications are submitted to the department by September 1st of each year, or on a date at the beginning of September designated by the department in the event that the 1st falls on a weekend or holiday (postmarked or shipped on or before September 1st is acceptable).

Aid for Debt Retirement: applications can be submitted at any time during the year if there is an authorized debt program in effect. **To verify if there is an authorized debt program in effect, contact the department.**

1b. Primary purpose.

Check **one** box in the appropriate column to indicate the primary purpose of the project. Each application should be for a single project for a particular facility, and should be independently justified. The district may include work in other categories in a proposed project. These projects will be reviewed and evaluated as mixed-scope projects. Refer to Appendix A of these instructions for descriptions of categories and the limitations associated with grant category C, category D, and category E projects. Application of scoring criteria will be on a weighted basis for mixed scope projects. The department will change a project category as necessary to reflect the primary purpose of the project.[1]

1c. Phases of project.

Check the applicable phase(s) covered by this funding request. Refer to Appendix C for descriptions of phases.

2. ELIGIBILITY REQUIREMENTS TO SUBMIT AN APPLICATION

2a. District six-year plan.

Attach a current six-year Capital Improvement Plan (CIP) for the district. Use DEED Form 05-19-051. The project requested in the application must appear on the district's six-year plan in order to be considered for either grant funding or debt reimbursement. For grant funding, the project must appear in the first year of the district's six-year plan.

2b. Fixed asset inventory system.

The district does not need to submit any fixed asset inventory system information to the department as part of the CIP application. The department will verify the existence of a Fixed Asset Inventory System during its on-site Preventive Maintenance program review every five years. The department will annually review the district's most recently submitted annual audit for information regarding its fixed asset inventory system. School districts that

[1] The department's authority to assign a project to its correct category is established in AS 14.11.013(c)(1) and in AS 14.11.013(a)(1) under its obligation to verify a project meets the criteria established by the Bond Reimbursement & Grant Review Committee under AS 14.11.014(b)

do not have an approved fixed asset inventory system, or a functioning fixed asset inventory system (i.e., cannot be audited) will be ineligible for grant funding under AS 14.11.011.

2c. Property insurance.

The department may not award a school construction grant to a district that does not have replacement cost property insurance. AS 14.03.150, AS 14.11.011(b)(2) and 4 AAC 31.200 set forth property insurance requirements. The district should annually review the level of insurance coverage as well as the equipment limitations of the policy, and the per-site and per-incident limitations of the policy to assure compliance with state statute and regulation.

District facility insurance data is required to be provided by each district to the department under AS 14.03.150 and 4 AAC 31.200. Insured replacement value will include all district facilities reported in the department's School Facility database:

https://education.alaska.gov/Facilities/SchoolFacilityReport/SearchforSchoolFac.cfm

Note: This information is used in calculating scores for question 9d. The five-year average expenditure for maintenance is divided by the five-year average insured replacement value, districtwide.

2d. Capital improvement project.

AS 14.11.011(b)(3) requires a district to provide evidence that the funding request should be a capital project and not part of a preventive maintenance or regular custodial care program. Refer to Appendix F for an explanation of maintenance activities. Scope of work will be modified by the department during review of the application to remove items deemed to be preventive maintenance or custodial.

2e. Preventive maintenance program.

Under AS 14.11.011(b)(4), a district must have a certified preventive maintenance program to be eligible for funding. Initial notification of district certification is provided by June 1; final determination of a district maintenance program is issued August 15. For more information contact the department.

~~**2f. Insurance.**~~

~~District facility insurance data is required to be provided by each district to the department under AS 14.03.150 and 4 AAC 31.200. Insured replacement value will include all district facilities reported in the department's School Facility database:~~

~~https://education.alaska.gov/Facilities/SchoolFacilityReport/SearchforSchoolFac.cfm~~

~~**Note:** This information is used in calculating scores for question 9d. The five-year average expenditure for maintenance is divided by the five-year average insured replacement value, districtwide.~~

3. PROJECT INFORMATION

3a. Priority assigned by the district. (30 points possible)

The district ranking of each project application must be a unique number approved by the district school board and must place each discrete project in priority sequence. The project having the highest priority should receive a ranking of one, and each additional project application of lower priority should be assigned a unique number in priority order. The department will accept only one project with a district ranking of priority one. The ranking of each application should be consistent with the board-approved six-year Capital Improvement Plan. Refer to AS 14.11.013(b)(2). Both major maintenance projects and school construction projects should be combined into a single six-year plan. There are up to 30 points available for a district's #1 priority. Points drop off in increments of 3 for each corresponding drop in district priority ranking. If the application score is requested to be reused in a future year, the reused score will be adjusted based on a change in the project ranking on the associated future year's six-year plan.

The district should provide a listing of *projects anticipated for the full six years* of the district's six-year plan, not just the first year of the plan.

3b. School facilities within scope. (30 points possible)

This question requests information on the year the facility was constructed and size of each element of the facility to establish the "weighted average age of facilities" score. If a project's scope of work is limited to a portion of a building (i.e., the original or a specific addition), the age of *that building portion* will be used in the "weighted average age of facilities" point calculation. If the project's scope of work expands to multiple portions of a building, the ages of *all building portions receiving work* will be used in the "weighted average age of facilities" point calculation. *Year built* refers to the year the original facility and any additions were completed or were first occupied for educational purposes. If a date of construction is not available, use an estimate indicated by an (*). *Gross square footage (GSF)* of each addition should be the amount of space added to the original facility. *Total size* should equal the total square footage of the existing facility. There are up to 30 points possible depending on the age of the building. Facility number, name, year built, and size are available online at:

http://education.alaska.edu/Facilities/SchoolFacilityReport/SearchforSchoolFac.cfm

Department data will be used for calculations, if there is an error in the database, contact the department prior to September 1.

3c. Facility status.

The response to this question should be consistent with column III of the space utilization table in question 5i. Projects that will result in demolition or surplusing of existing owned or leased facilities must include a detailed plan for the transition from existing facilities to replacement facilities. If a facility is to be demolished or surplused, the project must provide for the abatement of all hazardous materials as part of the project scope. The transition plan should describe how surplused state-owned or state-leased facilities will be secured and

maintained during transition. The detailed plan for demolishing or surplusing state-owned or -leased properties should incorporate a draft of the department's Form 05-96-007, Excess Building. For the CIP process, furnish building data and general information; signatures and board resolutions may be excluded.

3d. Project description/Scope of work.

Describe the scope of work of the entire project. The project description/scope of work should include: (1) a detailed description of the project, (2) documentation of the conditions justifying the project, and (3) a description of the scope of the project and what the project will accomplish. The scope should also contain sufficient quantifiable analysis to show how the project is in the best interest of both the district and the state.

The description of project scope should include information that will allow the department to evaluate the criteria specified in AS 14.11.013, including conformance with the ASHRAE 90.1-2016 energy efficiency standard and the *Alaska School Design and Construction Standards* published by DEED and incorporated as Appendix B of these instructions; ensure project aligns with selected category. Project scope should be sufficiently defined to assure bidding a single contract. If proposing a "districtwide" project, applicant should provide justification in question 3h of how it is more cost-effective to combine multi-site (multi-community) projects.

It is helpful to identify the question number if you are providing detail to support another application question in the project description.

Question 2d: AS 14.11.011(b)(3) requires the district to provide sufficient evidence that the funding request should be a capital improvement project and not preventive maintenance (including routine maintenance) or custodial care. Refer to Appendix F of these instructions for information regarding the definitions of maintenance terms related to this question.

Question 3b: If the project impacts multiple facilities, the project description shall identify the facilities impacted and describe how each will be impacted. For facilities with both Original and Addition space, identify the discrete section(s) of the portion being impacted. For "districtwide" projects, a detailed description and scope is required for each facility.

Question 3c: Projects that will result in demolition or surplusing of existing owned or leased facilities must include a detailed plan for the transition from existing facilities to replacement facilities.

Question 3g: Site description should include location, size, availability, cost, and other pertinent information as appropriate. If a site selection and evaluation report is attached, the information can be referenced with a brief summary, rather than being reproduced in this section.

Question 3f: If project is complete or partial complete, identify which scope elements have been completed.

Question 5c: If this project will (1) result in renovated or additional educational space, and (2) serve students of the same grade levels currently housed or projected to be housed in other schools, the project description should indicate the:

- attendance areas that will be impacted (i.e. will contribute students) by this project,
- current and projected student populations in each facility (school) affected by the project, and
- DEED gross square footage for each affected facility (school) in the attendance area.

Question 6a-6d: If a facility condition survey, facility appraisal, schematic design, and/or design development documents are attached, they can be summarized and referenced, rather than reproduced in the description of project need, justification, and scope. If project is complete, and schematic design or design development documents are not attached, provide a justification for why documents are not needed.

Question 8c: When a new, renovation, new-in-lieu-of-renewal, or Category E project is proposed, the project description should include a brief discussion of the cost/benefit and life cycle cost principles which guided this project solution. The detailed cost/benefit analysis and life cycle cost analysis documents shall provide data documenting conditions that justify the project [AS 14.11.011(b)(1)]. If these documents are attached, they can be referenced and summarized, rather than reproduced in the project description.

3e. Project Schedule.

Provide an estimated project timeline that includes, at a minimum, the estimated date for receipt of funding, estimated construction start date, and estimated construction completion date. Identify any additional project schedule milestones or special circumstances that are applicable to the project. Include any schedule changes anticipated if alternative delivery is considered for the project. An alternative project delivery method is required to be approved by the department. If an alternative project delivery method is proposed for the project (including in-house), provide completed request or department approval with application, including any bid documents, etc.

3f. Complete or partially completed project.

Indicate whether the work identified by the project request is partially or fully complete. In question 3d, clearly identify which scope elements have been completed. If the construction work is partially or fully complete, attach documentation that establishes that the construction was procured in accordance with 4 AAC 31.080.

- Competitive sealed bids must be used unless alternative procurement has been previously approved by the department.
- Projects under $100,000 can be constructed with district employees if prior approval is received from the department. For projects that utilized in-house labor, attach the DEED approval of the use of in-house labor [4 AAC 31.080(a)]. If a project utilized in-house labor, or was constructed with alternative procurement methods, and does not have prior approval from the department, the project's construction budget will be reduced [4 AAC 31.080(e)].

- For construction contracts under $100,000, districts may use any competitive procurement method practicable. Provide an explanation of circumstances requiring selected procurement method with attachment.

For projects with contracted construction services, attach construction and bid documents utilized to bid the work, advertising information, bid tabulation, construction contract, and performance and payment bonds for contracts exceeding $100,000. Projects shall be advertised three times beginning a minimum of 21 days before bid opening. The bid protest period shall be at least 10 days. Construction awards must NOT include provisions for local hire. Provide bid documents and bid tabulations as projects attachments.

If district has been working with the department for approval of project delivery method, design, and construction, provide the DEED recovery of funds project number in the space provided.

A district can submit for reimbursement of project costs for work completed up to 36 months prior to the initial submission of the application with a substantially identical scope. This can include costs in any phase: planning (e.g. condition survey), design, and construction. A district can submit for reimbursement of costs for site acquisition approved under 4 AAC 31.025 and incurred up to 120 months before the initial submission of the application with a substantially identical scope.

3g. Acquisition of additional land.

Acquisition of additional land refers to expansion of an existing school site using property immediately adjacent to, or in close proximity to, the existing school site. Land acquisition may result from long-term lease, purchase, or donation of land. *Utilization of a new school site* refers to use of a site previously acquired by the district, or a new site acquired as a result of this application and not previously utilized as a public school.

If the project site is not yet known, the site description should be the district's best estimate of specific site requirements for the project, and it should be included in the project description. The department's 2011 publication, *Site Selection Criteria and Evaluation Handbook*, may be useful in responding to this question. A site selection study is required for those projects involving new sites in order to qualify for schematic design points (reference Appendix C).

3h. Multiple-school or districtwide project.

Explain how a multiple site project is cost effective and in the state's best interest and how the district will provide for a single contract in either design or construction. Provide justification of need for multiple contracts.

4. CODE DEFICIENCY / PROTECTION OF STRUCTURE / LIFE SAFETY

4a. Code deficiency / Protection of structure / Life safety. (Up to 50 points)

Describe in detail the issue, impact, and severity of code deficiency, protection of structure, and life safety conditions being addressed by the project scope in question 3d; attach supporting documentation. If construction of a new school is proposed, describe any code issues at existing facilities in the attendance area that will be relieved by the project.

Code deficiency, protection of structure, and life safety-related categories:

Code Deficiency: Deficiencies related to building code conditions where there is no threat to life safety. This includes compliance with various current building and accessibility codes.

Protection of Structure: Deficiencies that, when left unrepaired, will lead to new or continued damage to the existing structure, building systems, and finishes resulting in a shortened life of the facility.

Life Safety: Deficiencies representing unsafe conditions threatening the health and life safety of students, staff, and the public. For example, required fire alarm and/or suppressant systems are non-existent or inoperative posing a life safety risk.

Note: Complete or imminent building failure caused by code deficiency, protection of structure, or life safety conditions resulting in unhoused students may be viewed as a more critical project.

The project could contain a single severe condition or multiple moderate conditions. Multiple conditions will be rated collectively, but may not necessarily rank as high as a single severe condition. For projects, such as districtwide projects, that combine critical and non-critical work, points for the critical portion of the project will be weighted proportionally.

The scoring matrix for this category (ref. Guidelines for Raters of the CIP Application) is reproduced in the application, and groups deficiencies into the following eight categories: Site, Structural, Roof/Envelope, Arch/Interior/ADA, Mechanical, Electrical, Fire Alarm/Sprinkler, and UST/AST/Hazmat. Identify the condition from the matrix and provide a relevant description of the conditions with references to supporting documentation. While extensive, the discrepancies listed in the matrix may not be exhaustive. If a deficiency is not listed, note that in the description and use the listed deficiencies as a context for determining appropriate documentation. Note that only the highest supported scoring condition will be assigned points for a given issue corrected by the project scope.

As indicated in the matrix, code deficiency, protection of structure, or life safety conditions scoring incorporates ranges based on the established severity ranges of the conditions and upon the documentation provided to support the reported severity. Supporting

documentation of the conditions is critical. Documentation that supports the conditions can be documents such as: condition surveys, third party communications, maintenance work orders, or other records verifying the conditions. This is not an exclusive list and applicants are encouraged to provide other sources of quantitative information to support the building or component condition. The primary purpose of this documentation is to present objective, primary, specific, and verifiable data.

For matrix scores based on average number of work orders over time, include copies of the relevant work orders. Work order detail should match that required under 4 AAC 31.013(a)(1).

Supporting documentation elsewhere in the application can be summarized and referenced, rather than reproduced in the narrative. When citing information elsewhere in the application or application attachments, provide the specific location of the referenced information.

5. REQUIREMENTS FOR SPACE TO BE ADDED OR REPLACED

NOTE: Gross square footage entries in this section should reflect the measurements specified by 4 AAC 31.020. Space variance requests not already approved by the department must be submitted in accordance with 4 AAC 31.020 by the application deadline in order to receive consideration with the current request. The department will not consider space variance requests during the application review process for work proposed in the application.

5a. Project grade levels.

The response to this question should reflect the grade levels that will be served by the facility at the completion of the project.

5b. District voter-approved projects.

Any additional square footage that is funded for construction or approved by local voters for construction should be listed with a descriptive project name, additional GSF, grade levels to be served, and anticipated student capacity. Include these projects in any capacity/unhoused calculations provided in the year of anticipated occupancy.

5c. Other school facilities.

List all schools in the attendance area that serve grade levels equivalent to those of the proposed project. If the project includes any elementary grades, all schools in the attendance area serving elementary students are to be listed. If the project includes any secondary grades, all schools in the attendance area serving secondary students are to be listed. For each school listed, include its size, the grades served, and the school's total student capacity. Use the department's "2017 Attendance Area ADM & GSF Calculations" MS Excel worksheet to calculate the total student capacity for each school. A link to this form and the "Attendance Areas" report can be found under at http://education.alaska.gov/facilities/FacilitiesCIP.html

5d. Date of anticipated occupancy.

The date provided here should be the anticipated date the facility will be occupied. This will be the starting point for looking at five-year post-occupancy population projections. If a project schedule is available, it should be provided to substantiate the projected date.

5e. Unhoused students. (80 points possible)

All projects that are adding new space or replacing existing space must complete Table 5.1 ATTENDANCE AREA ADM and worksheets in the department's MS Excel workbook, "~~217~~ Attendance Area ADM & GSF Calculations" found under "Space Guidelines" at http://education.alaska.gov/facilities/FacilitiesCIP.html. These worksheets are the tools for determining space eligibility.

Include copies of the worksheets "ADM", "Current Capacity", and "Projected Capacity" with the application. The department may adjust the submitted ADMs and allowable space as necessary for corrections.

The points for this question are based on the following formulas:

1. Current Unhoused Students: If current capacity is at or below 100%, 0 points will be awarded. If current capacity is over 100%, then one point for every 3% percent over 100% capacity will be awarded. For projects that have a current capacity over 250%, the full 50 points will be awarded.
2. Unhoused Students in Seven Years: If capacity five years post-occupancy is at or below 100%, 0 points will be awarded. If capacity five years post-occupancy is over 100%, then one point for every 5% over 100% capacity will be awarded. For projects that have a capacity five years post-occupancy over 250%, the full 30 points will be awarded.
   Scoring for projected unhoused due to facility loss by external environmental factors (reference question 5g) is scored at half points: If capacity five years post-occupancy is over 100%, then one point for every 10% over 100% capacity will be awarded.

5f. ADM projection method.

Identify the method(s) that were utilized to determine the student population projections listed in Table 5.1. The department will compare the projections to historic growth trends for the attendance area. The department will revise population projections that exceed historical growth rates, show disparate growth between elementary and secondary populations, or are unlikely to be sustained as an attendance area's overall population grows.

Inclusion of a charter school population housed in lease space due to terminate within two years may be included; include a copy of the lease as an attachment to the application. The application should include student population projection calculations and sufficient demographic information (e.g., housing construction, economic development, etc.) to justify the project's population projection.

5g. Confirm space eligibility.

Existing space is determined as all permanent facility gross square footage (GSF) within an attendance area as reported in the DEED School Facility Database; for attendance areas with multiple main schools serving a type of school (elementary, secondary, K-12, mixed grade) this will include more facilities than are reported in question 3b "school facilities within scope" or included in question 5j "project space utilization" (Table 5.2).

Utilize data from the ADM projections/GSF calculations workbook to complete this question. For "Total Existing SF", enter all GSF from permanent facilities serving the same school type within the attendance area. For "Remaining Existing SF", subtract any square footage that will be demolished or disposed of from the "Total Existing SF" and enter the remainder. For "Total Eligible SF", enter the total of the square footage calculation based on the school's average daily membership (ADM). For "Qualifies for additional SF", enter the amount of additional qualified square footage by subtracting the "Remaining Existing SF" from the "Total Eligible SF". For "Applying for additional SF", enter the amount of additional square footage that will be added in this. The amount of square footage that is applied for may be the same or less than the amount of the qualified square footage.

A district may submit a future unhoused projection based on an imminent loss of a facility due to certain external environmental factors like erosion. To support the projection, the district must provide credible evidence and documentation that the facility will be lost or unsafe for occupancy within two years. A district would also need to provide a specific plan for how it will accommodate students without the facility, should the facility become incapable of housing students, and address how the facility will be disposed of in the transition plan (question 3c).

5h. Regional community facilities. (5 points possible)

Statutes require an evaluation of other facilities in the area that may serve as an alternative to accomplishing the project as submitted. Information regarding the availability of such facilities and the effort (e.g. cost, time, etc.) required to make the facility usable for the school needs represented by the project should be provided. The area is not restricted to the attendance area served by the project.

Projects in Category F, which may not relate to providing alternate facilities for unhoused students, should describe existing community facilities (parking, sporting, or outdoor recreation areas) related to the project scope.

There are up to 5 points available for an adequate description showing that the district has considered alternatives to the proposed project for housing unhoused students or providing the desired feature.

Statutory and Regulatory Reference: AS 14.11.013(b)(4), 4 AAC 31.022(c)(5)

5i. Educational Specifications.

A district planning a project to add or reconfigure space is required to develop an educational specifications document and provide it to the department for review. [See AS 14.07.020(11),

4 AAC 31.010] For projects adding or reconfiguring space, an educational specification is a required planning document in Appendix C for planning/concept design points.

5j. Project space utilization. (30 points possible)

Table 5.2 Project Space Equation summarizes space utilization in the proposed project expressed in gross square feet. Space figures represented should tabulate to match the gross building square footages reported in question 3b as well as those shown in Table 7.2 of the cost estimate section. Report of demolition, including support facilities being partially or completely demolished, should be consistent with question 3c.

The worksheet at Appendix E lists types of school space that fit in each category. The sum of columns I (space to remain "as is"), II (space to be renovated), and III (space to be demolished) should equal column A (existing space). The sum of columns I, II, and IV should equal column B (total space upon completion). There are up to 30 points possible on the school construction list for the type of space being constructed.

6. PROJECT PLANNING & DESIGN

There are four distinct items in this question. Each one has the potential to generate points.

6a. Condition/Component survey. (0 to 10 points possible – refer to Rater Guidelines for scoring criteria)

A *facility condition survey* is a technical survey of facilities and buildings, using the department's Guide for School Facility Condition Survey or a similar format, for the purpose of determining compliance with established building codes and standards for safety, maintenance, repair, and operation. Portions of the condition survey, such as that information pertaining to building codes and analysis of structural and engineered systems including site assessment may be completed by an architect, engineer, or personnel with documented expertise in a building system. For project scopes that are component or system renovations, a condition survey of the component or system is acceptable.

A facility condition survey is required for major rehabilitation projects to receive further planning and design points. Projects with scopes that warrant identification of in-depth examination of deteriorated systems will require a scope-specific facility or component condition survey to receive points beyond Phase I Planning/Concept Design. Condition surveys should be clearly identified and establish a specific date or date range when the survey occurred or was produced.

The department does not consider submittal of a Spill Prevention, Control, and Countermeasures (SPCC) Plan as a condition survey for fuel tank or fuel facility projects. In addition, an energy audit, although useful and informative, will not receive condition survey points if the project's scope warrants additional facility condition survey data.

6b. Use of prior school design (10 points possible)

Statutes require that the department shall encourage school districts to use previously approved school construction design if the use will result in a cost savings for the project.

Provide the following information regarding plan availability and the costs to revise the plan to meet the needs of the current project:

- Complete documents of the proposed reused school plans.
- Evidence of ownership of proposed reused school plans.
- An analysis of the anticipated deviations and revisions from the proposed reused school plans along with an estimated cost of those deviations (+ or -).
- An estimate of the design and construction costs for the proposed reused school plans along with an estimate of the cost of design and construction for a project alternative for a new school design. If a district does not own the school plan proposed for reuse, estimate must include cost of purchasing design or of another arrangement.

Five measures are identified to determine the range of effectiveness in using a prior school design:

1. The district's ownership and legal ability to effectively use the prior design.
2. The age of the prior design.
3. The amount of change to the prior design anticipated to be needed in the current project.
4. The estimated cost savings in construction costs achieved by the reuse.
5. The estimated cost savings in design services achieved by the reuse.

Up to 10 points are available (2 points for each of the identified measures) for a project that reuses a department-approved school design. This point category is only applicable to school construction projects (primary purpose Category A, B, or F).

Statutory and Regulatory Reference: AS 14.11.013(a)(4) and (b)(7)

6c. Use of prior building system design (10 points possible)

Statutes require that the department shall encourage school districts to use previously approved building systems if the use will result in a cost savings for the project. Five building system categories are available for evaluation of prior design use: 1) Building Envelope, 2) Plumbing, 3) HVAC, 4) Lighting, and 5) Power. A project application can receive points for capital renewal of: a complete system, a subsystem, or a component of system, once in each of these categories when evaluated against whether it is part of a published district or municipal facility standard that meets ASHRAE 90.1-2016 requirements; prior use of a system specification in a bid solicitation is not sufficient to meet the criteria.

The ASHRAE-compliant district or municipal standard must be provided with the application in order for the department to evaluate this criteria.

There are up to 10 points possible for a project that provides support for using a cost-effective building system standard; up to 2 points per qualified system category. This point category is not applicable to projects receiving scores for use of a prior school design.

Statutory and Regulatory Reference: AS 14.11.013(a)(4) and (b)(7)

6d. Planning / Concept design. (0 or 10 points possible)

Planning work includes the items listed under planning in Appendix C of this document. At the planning phase, existing conditions may be assumed based on standard life expectancies and other industry norms. Condition/component surveys are only required for projects proposing major rehabilitation. Some projects may not require the services of an architect or engineer; typically these projects are limited in scope where drawings and extensive technical specifications are not necessary in order to issue an Invitation to Bid. Provide a justification in question 6e if no consultant was selected. Some projects do not require concept design or educational specifications. Reference Appendix C for projects which require these planning documents. The department's Program Demand Cost Model is acceptable as a planning/concept level cost estimate. There are 10 points possible for completed planning/concept design work.

If design has progressed further than planning/concept design, then schematic design (35%) design development (65%), or construction level drawings and cost estimates may be submitted in lieu of concept design documents.

A *facility appraisal* is an educational adequacy appraisal following the format or similar formats of the Council of Educational Facility Planners, International "Guide for School Facility Appraisal". An appraisal is optional; however, an appraisal document is useful to the department in evaluating the overall merits of the project request.

6e. Schematic design – 35%. (0 or 10 points possible)

Schematic design work includes the items listed under schematic design in Appendix C of this document. There are 10 points possible for completed schematic design work.

Project development to schematic design on most projects requires a condition/component survey to assess existing conditions. Condition/component surveys are required for projects proposing major rehabilitation and may be required for other projects if necessary to adequately support the scope of the proposed work.

Some projects may not require a schematic design in order to issue an Invitation to Bid. Typically these projects are limited in scope where drawings and extensive technical specifications are not necessary. Provide a justification if schematic design documents were not needed. The department's Program Demand Cost Model is not an acceptable Schematic level estimate.

If design has progressed further than schematic design (35%), then design development (65%) or construction level drawings and cost estimates may be submitted in lieu of schematic design documents.

6f. Design development – 65%. (0 or 5 points possible)

Design development work includes items listed under design development in Appendix C of this document. There are 5 points possible for completed design development work.

Project development to schematic design on most projects requires a condition/component survey to assess existing conditions. Condition/component surveys are required for projects proposing major rehabilitation and may be required for other projects if necessary to adequately support the scope of the proposed work.

Construction level drawings and cost estimates may be submitted in lieu of design development documents.

6g. Planning / Design team.

The application needs to identify the district's architectural or engineering (A/E) consultant for the Condition Survey, Planning, Schematic Design and Design Development work. Certain projects of limited scope may not require consultant selection to qualify for planning/concept level design point, but may be required for schematic design or design development levels, depending on project complexity. If there is no consultant, the district must provide a detailed explanation of why a consultant is not required for the project. For others besides licensed design professionals currently registered in the State of Alaska, provide the qualifications for design team members that the district accepted. For example, if one is a school board member who is also an electrician, please note both. Likewise, note a district employee with X years as a licensed roofing contractor, or a maintenance person with X years as the lead mechanical custodian for the district.

Identify any additional consultants hired for pre-construction work, including independent value analysis or commissioning agent, as required.

7. COST ESTIMATE

Cost estimate for total project cost. (30 points possible)

7a. Project cost estimate.

For all applications, including those for planning and design, cost estimates should be based on the district's most recent information and should address the project being requested. Refer to Appendix D for descriptions of elements of the total project cost. The cost estimate should be of sufficient detail that its reasonableness can be evaluated. If a project is projected to cost significantly more than would be predicted by the Department's current Program Demand Cost Model, provide attachments justifying the higher cost. If there are special requirements, a detailed explanation and justification should be provided in question 7c.

Table 7.1 Total Project Cost Estimate.

In Table 7.1, all prior AS 14.11 funding for this project should be listed by category and totaled in Column I. If a grant has not been issued, but an appropriation has been made, use the appropriated amount plus participating share in lieu of the issued grant or bond amount. Column II should list the amount of funding being requested in this application, by category and in total. Column III should show a percentage breakdown for the total project allocated costs as a percentage of the total construction cost. Column IV should list the total project

cost estimate from inception to completion, all phases. Calculate the percent of construction for all cost categories except Land, Site Investigation, and Seismic Hazard. To calculate the percent of construction, divide the category costs by the Construction cost and multiply by 100%. Use Column IV costs to calculate the percent of construction. Other categories should be within the ranges listed. Construction Management (CM) by consultant must be less than 4% if the total project cost is less than or equal to $500,000; 3% for project costs between $500,000 - $5,000,000; and 2% for projects of $5,000,000 or greater [AS 14.11.020(c)]. The percent for art, required for all renovation and construction projects with a cost greater than $250,000, and which requires an Educational Specification, is given a separate line. Project Contingency is fixed at 5%. The total project cost should not exceed 130% of construction cost, excluding land and site investigation. If the project exceeds the recommended percentages, add a detailed justification in question 7c.

Seismic Hazard costs include the costs required to assess, design, and perform special construction inspections for a school facility. These costs include the costs for an assessment of seismic hazard at the site by a geologist or geotechnical engineer with experience in seismic hazard evaluation, an initial rapid visual screening of seismic risk, investigation of the facility by a structural engineer, design of mitigation measures by a structural engineer, third party review of seismic mitigation measures, and special inspections required during construction of the seismic mitigation components of the project. The costs associated with this budget item must be prepared by a licensed professional engineer with experience in seismic design. The district should refer to the Peak Ground Acceleration information for various areas of the state available on the department's CIP website (education.alaska.gov/Facilities/FacilitiesCIP.html)

Table 7.2 Construction Cost Estimate.

This summarization of construction costs is structured to be consistent with the DEED cost model. Other estimating formats may not provide an exact correlation; however, the following categories **MUST** be reported to allow adequate comparisons between projects: basic building, site work and utilities, general requirements, contingency, and escalation. Do not blank out or write over this table. If the application includes a cost estimate from a designer or professional cost estimating firm, Table 7.2 must still be filled out as described above.

Note: Cost estimates are preferred in the DEED *CostFormat*. Alternative formats will not impact points assigned but could impact the project's eligible amount for cost estimate expenses. Although not required for a project application, cost estimates provided as a submittal for a project awarded a grant allocation will need to conform to the DEED *CostFormat*.

Up to 30 points are possible for reasonableness and completeness of the cost estimate provided in support of the project.

7b. Cost estimate source.

Identify the source of the cost estimate. A cost estimate could be from a professional design or estimating firm, vendor quotes, actual invoices, or based on the documented costs of a similar project in the district.

7c. Cost estimate discussion and justifications.

Provide sufficient information to support meaningful evaluation of the project cost and the reasonableness of the cost estimate. Though basic cost information is incorporated into Tables 7.1 and 7.2, many cost elements reported in standard estimates will require further explanation or support. Please refer to Appendix D for guidelines covering project cost estimate percentages for factored cost items. Provide justification for any lump-sum elements used in the cost estimate, including site work and utilities. If the project exceeds a recommended percentage for a specific category or if the project is requesting more than 30% in additional percentage costs, provide a detailed justification. The project scope and cost estimate should be increasingly detailed as project phases advance.

Identify attachments with additional information regarding project cost that may aid in evaluating the reasonableness of the cost estimate. Documents may include a life cycle cost analysis, cost benefit analysis, bid documents, actual cost estimates, final billing statement for completed projects, and any additional supporting documentation justifying project costs.

8. ADDITIONAL PROJECT FACTORS

8a. Emergency conditions. (50 points possible)

Emergencies are conditions that pose a high level of threat for building use by occupants. An emergency exists when students are currently unhoused due to the loss of the facility, or damage to the facility due to circumstances associated with the emergency. An emergency also exists when the district's ability to utilize the facility is impacted or there is an immediate or high probability of a threat to property, life, health, or safety.

Not all systems or components that have reached the end of their useful life or are starting to fail are considered to be emergencies. A system or component that has reached the end of its useful life or has started to fail, but routine or preventive maintenance prolongs the life of the system or component, is not considered to be an emergency. Example: A roof that has started to leak and the leaking is stopped with routine maintenance would not constitute an emergency. A roof that is leaking, where rot has been found in the structure of the roof and routine maintenance no longer prevents water from entering the building, could be considered an emergency.

Describe in detail the nature, impact, and immediacy of the emergency and actions the district has taken to mitigate the emergency conditions. At a minimum, include the following:

- the nature of the emergency,
- the facility condition related to the emergency,

- the threat to students and staff,
- the consequence of continued utilization of the facility,
- the individuals or groups affected by the condition,
- what action the district has taken to mitigate the emergency conditions, and
- the extent to which any portion of the project is eligible for insurance reimbursement or emergency funding from any state or federal agency.

Supporting documentation of the conditions is critical. Documentation that supports the conditions can be documents such as: condition surveys, photos, third party communications, insurance claims, or other records verifying the conditions. This is not an exclusive list and applicants are encouraged to provide other sources of quantitative information to support the emergency condition. The primary purpose of this documentation is to present objective, primary, specific, and verifiable data.

The emergency descriptions with check boxes contained in question 8a are to help the applicant identify the type of emergency the project is resolving. The applicant must provide a description of the particular emergency in the application and include all relevant documentation that supports the immediacy or high probability of the threat or emergency. An application that checks an emergency building condition box without a description of the emergency will receive no points.

The matrix below incorporates the emergency conditions categories listed in the application with supporting examples.

Building

Building is destroyed or rendered functionally unsafe for occupancy and requires the building to be demolished and rebuilt. Example: A flood or fire event has destroyed or left the building so structurally compromised that the building must be demolished.

Building is unsafe and the entire student population is temporarily unhoused. The building requires substantial repairs to be made safe for the student population to occupy the building. Example: The roof of a school came off in a severe wind storm with water damage to interior finishes.

Building is occupied by the student population. A local or state official has issued an order that the building will need to be repaired by a certain date or the district will have to vacate the building. Example: It is discovered that the building does not meet current specified safety standards and the building will need to be made current with the standards within the next 90 days. Documentation substantiating the order needs to be supplied.

A portion of the building requires significant repair or replacement of damaged portion of building. The damaged portion of the building cannot be used for educational purposes. Example: The roof leaked over a classroom causing structural damage to the walls, which restricts the use of the room until the repairs are made.

Components or Systems
A major building component or system has completely failed and is no longer repairable. The failed system or component has rendered the facility unusable to the student population until replaced. Example: The heating plant has completely failed leaving the building unusable to the student population and susceptible to freezing and further damage.

A major building component or system has a high probability of completely failing in the near future. The component or system has failed, but has been repaired and has limited functionality. If the component fails, the district may be required to restrict use of the building until the component or system is repaired or replaced. Example: A fire alarm system has a history of components failing and given the age of the system, parts are no longer available. The system has a high probability of failing completely and district may have to vacate the building.

Statutory and Regulatory Reference: AS 14.11.013(b)(1)

8b. Inadequacies of space. (40 points possible)

Describe how the project will improve existing facilities to support the instructional program. The response should address how the inadequacies of the facility impact the instructional program and whether that instructional program is a mandatory, existing local, or a proposed new local program. Types of inadequacies addressed may include the quality of space, amount of space, or configuration of the space.

Statutory and Regulatory Reference: AS 14.11.013(b), 4 AAC 31.022(c)(4)

8c. Other options. (25 points possible)

In an effort to support the project submitted as the best possible, districts should consider a full range of options during planning and project development.

- A cost/benefit analysis, life cycle cost analysis, or other evaluative processes used by the district in reaching its design solution should be included. See also Item I, Project Eligibility Checklist, which requires a life cycle cost analysis, a cost benefit analysis, or any other quantifiable analysis, when needed, to demonstrate that the project is in the best interest of the district and the state.
- A project that proposes component replacement should discuss the merits of alternative products, material options, construction methods, alternative design, or other solutions to the problem as applicable.
- A project that proposes roof replacement should discuss the merits of different roofing materials, the addition of insulation, or altering the roof slope and provide an explanation as to why these options were not selected.
- If the proposed project will add new or additional space, districts may consider options such as double shifting, service area boundary changes, and any space available in adjacent attendance areas that are connected by road. In districts that contain adjacent attendance areas, at least one of the options considered must be an evaluation of potential boundary changes.

- Projects that propose construction of a new school should discuss other options, such as renovation of the existing building or acquisition of alternative facilities, and provide an explanation as to why these options were not selected.
- Scoring in this area will be related to factors such as: the range of options, the rigor of comparison, the viability of options considered, and the quality of data supporting the analysis of the option. Options also need to consider the results of cost benefit analysis, life cycle cost analysis, and value analysis as necessary.

There are up to 25 points available for a documented comprehensive discussion on the options considered by the district that would accomplish the same goals as the proposed project.

Statutory and Regulatory Reference: AS 14.11.013(b)(6), 4 AAC 31.022(c)(6)

8d. Annual operating cost savings. (30 points possible)

Information (and evaluation points) related to operational costs is not limited to Category E projects. Explain and document ways in which the completion of the project would reduce current operational costs. This analysis should be consistent with a life cycle cost analysis or cost benefit analysis. Consider energy costs, costs related to wear-and-tear, maintenance of existing facilities costs, and costs incurred by current functional inadequacies at the facility and attendance area level. Provide benchmark values such as fuel costs, specific labor costs affected by the project, and historical record of problems to be addressed by this project.

For new facilities, discuss design choices that will provide periodic and long-term savings in the operation and maintenance of the facility. Although the addition of square footage may increase overall operational costs, project descriptions for this category of project should include information on methods and strategies used to minimize operational costs over the life of the building. Include cost benefit analyses that were accomplished on building systems and materials.

Up to 30 points are possible based on the projected cost savings payback with a full and complete description.

Statutory and Regulatory Reference: AS 14.11.013(b), 4 AAC 31.022(c)(3)

8e. Phased funding. (30 points possible)

Prior state funding refers to **grant funds appropriated by the legislature to the department and administered under AS 14.11 as partial funding for this project only.** Any amounts noted here should also be included in Table 7.1 of the Cost Estimate, question 7a. No other fund sources apply, including debt retirement. There are up to 30 points available if a project includes previous grant funding under AS 14.11, and the project was intentionally short funded.

8f. Participating share waiver.

Waivers of participating share should be in accordance with AS 14.11.008(d). Justification should be documented. See Appendix G in the attachments to these instructions for detailed information. Only municipal districts with a full value per ADM less than $200,000 that are

not REAAs are eligible to request a waiver of participating share. Contact the department for a district's most recent full-value per ADM calculation.

9. DISTRICT PREVENTIVE MAINTENANCE & FACILITY MANAGEMENT

District preventive maintenance and facility management. (60 points possible)

AS 14.11.011(b)(1) and 4 AAC 31.011(b)(2) require each school district to include with its application submittals a description of its preventive maintenance program, as defined by AS 14.11.011(b)(4), AS 14.14.090(10), and 4 AAC 31.013. Refer to Appendix F for details.

The scoring criteria for this area reflect efforts beyond just preventive maintenance. For each element of a qualifying plan outlined in 4 AAC 31.013, documents, including reports, narratives, and schedules, have been identified for nine separate evaluations. These documents will establish the extent to which districts have moved beyond the minimum eligibility criteria and have tools in place for the active management of all aspects of their facility management. The documents necessary for each evaluation are listed below. They are grouped according to the five areas of effort established in statute and are annotated as to the type of evaluation (i.e., evaluative or formula-driven). Refer to the Guidelines for Raters of the CIP Application for additional information on scoring.

Up to 60 points possible for a clear and complete reporting of the district's maintenance program.

Only two sets, one of which may be an electronic copy, should be provided by the district, regardless of the number of submitted applications.

Maintenance Management

9a. Maintenance management narrative (Evaluative) (up to 5 points available)

Provide a narrative description of the effectiveness of your work order-based maintenance management system along with supporting documents. Full points will be assigned where the following is provided:

- A narrative fully describes the maintenance management (MM) program and all of the following: maintenance structure and staffing, the work order program and process including work order classification, scheduling, tracking, and completion or deferral; how work orders are initiated and by whom; how component work order history and trends are used.
- Provides sample work order types showing PM, routine maintenance, and corrective work; includes cost of labor and materials. Work orders provided as part of application support for question 4a may be used by raters to assess this narrative.
- Provides sample component-based work orders (with component ID) that include component-specific checklist of preventive and/or routine maintenance.
- Provides sample routine or corrective work orders showing progression of scheduling from initial response to completion or deferral.
- Provides a component report for a minimum of 10% of main school facilities showing the date of installation and date of scheduled renewal or replacement; includes components from each building system listed in DEED's R&R schedule.

Scores will be reduced incrementally where information or supporting documents are not provided.

9b. Maintenance labor reports (Formula-Driven) (up to 15 points available)

Item A: Produce a districtwide report showing total maintenance labor hours collected on work orders by type of work (e.g., preventive, corrective, operations support, etc.) vs. labor hours available by month for the previous 12 months.

Item B: Produce a districtwide report that shows a comparison of completed work orders to all work orders initiated, by month, for the previous 12 months.

Item C: Produce a districtwide report showing the number of incomplete work orders sorted by age (30 days, 60 days, 90 days, etc.) and status for the previous 12 months (deferred, awaiting materials, assigned, etc.).

These reports will demonstrate a district's ability to manage maintenance activities related to the level and scope of labor requirements. Recommended to review management reports to ensure that the reports make sense – internally consistent and reflective of work performed. Discuss discrepancies in narrative, Question 9a.

9c. PM/corrective maintenance reports (Formula-Driven) (up to 10 points available)

Item A: Provide a districtwide report that compares scheduled (preventive) maintenance work order hours to unscheduled maintenance work order hours by month for the previous 12 months.

Item B: Provide a districtwide report with monthly trend data for unscheduled work orders showing both hours and numbers of work orders by month for the previous 12 months.

These reports support the district's ability to manage maintenance activities related to scheduled (preventive) maintenance and unscheduled work (repairs). One factor in determining the effectiveness of a preventive maintenance program is a comparison of the time and costs of scheduled maintenance in relation to the time and costs of unscheduled maintenance.

9d. 5-year average expenditure for maintenance (Formula-Driven) (5 points available)

Districtwide maintenance expenditures for the last five years will be gathered by the department from audited financial statements. (Costs for teacher housing, utilities, or expenditures for which reimbursement is being sought will be excluded.) The department will calculate these items based on the Alaska Department of Education & Early Development Uniform Chart of Accounts and Account Code Descriptions for Public School Districts, 2018 Edition annual audited district-wide operations expenditure as the sum of Function 600 Operations & Maintenance of Plant expenditures in Fund 100 General Fund, excluding Object Code 430 Utilities, Object Code 435 Energy, Object Code 445 Insurance, all expenditures for teacher housing, and capital projects funded through AS 14.11. In addition, expenditures included in this calculation will not be eligible for reimbursement under AS 14.11.

The five-year average expenditure for maintenance is divided by the five-year average insured replacement value, districtwide. Insured value will include all district facilities reported in the department's facility database:
https://education.alaska.gov/Facilities/SchoolFacilityReport/SearchforSchoolFac.cfm

No information need be submitted with the application for this question.

Energy Management

9e. Energy management narrative (Evaluative) (up to 5 points available)

Provide a narrative description of the district's energy management program along with supporting documentation. Full points will be assigned where the following is provided:

- Narrative fully describes the Energy Management program including all of the following energy policy, program structure including roles, and responsibilities, occupant comfort and safety standards, energy consumption monitoring, benchmarking, energy audits and assessments, and implementation/execution of energy efficiency measures (EEMs).
- Provide data showing the program tracks energy by facility and calculates an energy use intensity (EUI) for each main school facility over the prior five years-by energy type.
- Provides an energy management guideline or manual, which is clearly identified as being issued/updated within the past five years, covering the items above.

- Provides a report showing a five-year history of implemented EEMs. Provides a complete set of energy consumption records for question 9f.

Scores will be reduced incrementally where information or supporting documents are not provided.

9f. Energy consumption reports (Formula-Driven) (5 points available)

Item A: Provide site-specific reports that compares monthly consumption for energy and utilities for all main schools over the previous 5 years.

These reports support the district's ability to manage energy use and establish the ability to evaluate usage trends over time in support of building performance.

Custodial Program

9g. Custodial narrative (Evaluative) (up to 5 points available)

Provide a narrative description of the district's custodial program along with supporting documentation. Full points will be assigned where the following is provided:

- Narrative fully describes the Custodial program including all of the following: custodial policy and purpose, program structure including staffing, roles and responsibilities, integration with district maintenance processes, worker and occupant safety, adopted custodial standards, and performance verification/quality control.
- Provides custodial program guideline or manual, which is clearly identified as being issued/updated within the past five years, covering the items above.
- Includes information or supplements that are specific to each main school facility and list types and quantities of surfaces and fixtures to be cleaned, and frequency of care for each based on the industry practice. Lists staffing requirements for the facility based on these metrics and industry standards for productivity.
- Provides a report which tabulates the preceding information (types and quantities of information, etc.) for all main schools in the district, including staffing requirements. OR Provides no less than two facility examples each year of submission with no repeats within a five-year period. If the district operates fewer than 10 schools, provided one-third of all facilities each year.
- Provides at least 5 work orders generated by the custodial program in the previous 12 months.
- Provides completed sets of quality control and inspection checklists for no less than two facilities for the previous fiscal year period.

Scores will be reduced incrementally where information or supporting documents are not provided.

Maintenance Training

9h. Maintenance training narrative (Evaluative) (up to 5 points available)

Provide a narrative description of the district's training program along with supporting documentation. Full points will be assigned where the following is provided:

- Narrative fully describes the Training program including all of the following: training policy, program structure including roles and responsibilities, identification of training needs for custodians and maintenance personnel, training methods and types, training scheduling and tracking, and measurement of program effectiveness.
- Identifies individual training needs based on job functions, and building systems supported, identifies training methods and types, and assigns training on an individual basis.
- Provides a sample analysis of job functions (e.g., driving, work order management, etc.) and required building system knowledge (e.g., boiler tuning, lock-out/tag-out, etc.) for at least one job classification.
- Provides a training plan, by individual, for training scheduled in the current school year, by training title and method or type.
- Provides a log of completed training (last 3 years), by individual.
- Provides an assessment of the effectiveness of the training program which, at a minimum includes data on scheduled versus completed training.

Scores will be reduced incrementally where information or supporting documents are not provided.

Capital Planning (Renewal & Replacement)

9i. Capital planning narrative (Evaluative) (up to 5 points available)

Provide a narrative description of the district's capital planning program along with supporting documentation. Full points will be assigned where the following is provided:

- Narrative fully describes the Capital Planning program including all of the following: district capital planning policy, capital planning responsibilities, structure, and staffing, capital needs forecasting based on system renewal and program/population changes, forecast verification (condition assessments, user input and maintenance work order history/trends, etc.), development of CIP projects and 6-yr plans, identification of capital project resources and funding.
- Provides capital planning report issued/updated within the past 12 months and 6-yr CIP plan with at least one project in every year of the plan and includes capital projects programmed from all fund sources, local, state, and federal.
- Provides a Facility Condition Index (FCI) for every main school based on a facility condition assessment not older than five years. Where FCI equals the cost of current and deferred renewal divided by the current replacement value.
- Provides a student population projection for a minimum of five years beyond the current fiscal year for every attendance area in the district.
- Provides a condition assessment for every project requesting state-aid in the first year of the 6-yr CIP plan.
- Provides a districtwide trend for combined FCI for a minimum of five prior years and tracks districtwide capital expenditures for main schools for a minimum of five prior years.

Scores will be reduced incrementally where information or supporting documents are not provided.

10. DISTRICT CONTACT INFORMATION

The district may provide names and e-mails for up to three additional persons besides the Superintendent or Chief School Administrator to whom the department will include in correspondence regarding changes made to the project application within the department's authority to determine a project eligibility, change a project's primary purpose, and modify a project's scope and budget. This includes any notification at the time the initial rankings are published and any determination based on district requests for reconsideration.

11. ATTACHMENTS CHECKLIST

Eligibility and project description attachments.

An application must include adequate documentation to verify the claims made in the application. The department may reject an application that does not have complete information or adequate documentation. See AS 14.11.013(c)(3)(A) and 4 AAC 31.022(d)(1). The eligibility and project description attachments checklist is provided to identify required materials and additional materials that are referenced in support of the project. The eligibility attachments are required for all projects. Projects with missing eligibility attachments will not be ranked. Check to see that your application is complete and indicate additional attachments the department should be referencing while evaluating the project.

APPENDIX A: CATEGORIES OF GRANTS

Adopted by the Bond Reimbursement & Grant Review Committee
April 17, 2019

AS 14.11.013(a)(1) - annually review the six-year plans submitted by each district under AS 14.11.011(b) and recommend to the board a revised and updated six-year capital improvement project grant schedule that serves the best interests of the state and each district; in recommending projects for this schedule, the department shall verify that each proposed project meets the criteria established under AS 14.11.014(b) and qualifies as a project required to:[1, 2]

A. "Avert imminent danger or correct life threatening situations." This category is generally referred to as "Health and Life Safety." A project classified under "A" must be documented as having unsafe conditions that threaten the physical welfare of the occupants. Examples might be that the seismic design of structure is inadequate; that the required fire alarm and/or suppressant systems are non-existent or inoperative; or that the structure and materials are deteriorated or damaged seriously to the extent that they pose a health/life-safety risk. The district must document what actions it has taken to temporarily mitigate a life-threatening situation.

B. "House students who would otherwise be unhoused." This category is referred to as "Unhoused Students." A project to be classified under "B" must have inadequate space to carry out the educational program required for the present and projected student population. Documentation should be based on the current Department of Education & Early Development Space Guidelines. (Refer to 4 AAC 31.020)

C. "Protection of the structure of existing school facilities." This category is intended to include projects that will protect the structure, enclosure, foundations and systems of a facility from deterioration and ensure continued use as an educational facility. Work on individual facility systems may be combined into one project. However, the work on each system must be able to be independently justified and exceed $50,000. The category is for major projects, which are not a result of inadequate preventive, routine, and/or custodial maintenance. An example could be a twenty-year-old roof that has been routinely patched and flood coated, but is presently cracking and leaking in numerous locations. A seven-year-old roof that has numerous leaks would normally only require preventive maintenance and would not qualify. In addition, no new space for unhoused students is permitted in this category, limiting its ability to be combined with other project types.

D. "Correct building code deficiencies that require major repair or rehabilitation in order for the facility to continue to be used for the educational program." This category, Building Code Deficiencies, was previously referred to as "Code Upgrade." The key words are "major repair." A "D" project corrects major building, fire, mechanical, electrical, environmental, disability (ADA), and other conditions required by codes. Work on individual facility

[1] Projects can combine work in the different categories with the majority of work establishing the project's type. For the purpose of review and evaluation, projects which include significant work elements from categories other than the project's primary category will be evaluated as **mixed scope** projects [4 AAC 31.022(c)(8)].

[2] Projects will be considered for replacement-in-lieu-of-renewal when project costs exceed 75% of the current replacement cost of the existing facility, based on a twenty-year life cycle cost analysis that includes disposition costs of the existing facility.

systems may be combined into one project. However, the work on each system must be able to be independently justified and exceed $50,000. An example could be making all corridors one-hour rated. Making one or two toilet stalls accessible would not fit this category. In addition, no new space for unhoused students is permitted in this category, limiting its ability to be combined with other project types.

E. "Achieve an operating cost saving." This category is intended to improve the efficiency of a facility and therefore, save money. Examples that might qualify are increasing insulation, improving doors and windows, modifying boilers and heat exchange units for more energy efficiency. The project application must include an economic analysis comparing the project cost to the operating cost savings generated by the project. In addition, no new space for unhoused students is permitted in this category, limiting its ability to be combined with other project types.

F. "Modify or rehabilitate facilities for purpose of improving the instructional unit." Category "F", Improve Instructional Program, was previously referred to as "Functional Upgrade." This category is limited to changes or improvements within an existing facility such as, modifications for science programs, computer installation, conversion of space for special education classes, or increase of resource areas. It also covers improvements to outdoor education and site improvements to support the educational program.

G. "Meet an educational need not specified in (A)-(F) of this paragraph, identified by the department." Any situation not covered by (A)-(F), and mandated by the Department of Education. (Currently, there are no such mandates.)

Alaska Department of Education & Early Development

APPENDIX B: REGIONALLY BASED MODEL SCHOOL CONSTRUCTION STANDARDS

Adopted by the Bond Reimbursement & Grant Review Committee
April 20, 2022

AS 14.11.014(b) requires the Bond Reimbursement and Grant Review (BRGR) Committee to "(3) develop criteria for construction of schools in the state; criteria developed under this paragraph must include requirements intended to achieve cost-effective school construction." These standards and criteria are considered by the department in its development and updating of regionally based model school construction standards that describe acceptable building systems and anticipated costs and establish school design ratios to achieve efficient and cost-effective school construction under AS 14.1.017(d). The department must consider these construction standards when evaluating applications.

The BRGR Committee has developed, reviewed, and approved the construction standards published by the department as the Alaska School Design & Construction Standards, dated April 20, 2022, for use evaluating CIP applications beginning with FY2024, with exceptions for projects completed prior to September 1, 2023, projects eligible for reuse of scores, and projects scoring 20 points or more in planning and design (combined scoring for questions 6d, 6e, 6f) prior to September 1, 2023.

Alaska Department of Education & Early Development

APPENDIX C: CAPITAL IMPROVEMENT PROJECT PHASES

Adopted by the Bond Reimbursement & Grant Review Committee

April ~~4, 2018~~

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

CONDITION/COMPONENT SURVEY (0 to 10 points possible)

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

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

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

1. Perform site evaluation and site selection analysis (4 AAC 31.025) - **(Required for new facilities)**
2. Prepare plan for transition from old site to new site, if applicable - (**Required for new facilities**)
3. Accomplish site survey and perform preliminary site investigation (topography, geotechnical) - (**Required for new facilities**)
4. Obtain letter of commitment from the landowner allowing for purchase or lease of site - (**Required for new facilities**)
5. Complete schematic design documents including development of approximate dimensioned site plans, floor plans, elevations and engineering narratives for all necessary disciplines - (**Required if necessary to adequately scope and complete the project**)
6. Complete preliminary cost estimate appropriate to the phase - (**Required**)
7. Accomplish a condition/component survey relevant to scope - (**Required if project is a major rehabilitation**[1] **or is necessary to adequately scope and complete the project.**)
8. Select commissioning agent (4 AAC 31.065; 4 AAC 31.080) - (**Required for new facilities or additions over 5000GSF, or rehabilitation of facility over 10,000GSF**)

[1] Under 4 AAC 31.900(7): "rehabilitation" means adapting an existing facility to improve the opportunity to provide a contemporary educational program; and includes major remodeling, repair, renovation, and modernization with related capital equipment.

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

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

~~8.~~ 10. Value analysis report

PHASE III - CONSTRUCTION

1. Complete required elements of planning and design not previously completed - (**Required**)
2. Prepare final cost estimate - (**Required**)
3. Complete final contract documents and legal review of construction documents (4 AAC 31.040)
4. Advertising, bidding and contract award (4 AAC 31.080) - (**Required for contracts over $100,000**)
5. Submit signed construction contract
6. Construct project
7. Procure furniture, fixtures, and equipment, if applicable
8. Substantial completion

~~8.~~ 9. Commissioning report

~~9.~~ 10. Final completion and move-in

~~10.~~ 11. Post occupancy survey

~~11.~~ 12. Obtain project audit/close out

Construction Management (CM) by a private contractor. Costs may include oversight of any phase of the project by a private contractor. Construction management includes management of the project's scope, schedule, quality, and budget during any phase of the planning, design and construction of the facility. The maximum for construction management by consultant is 4% of the total project cost as defined in statute [AS 14.11.020(c)].

Land is a variable unrelated to construction cost and should include actual purchase price plus title insurance, fees, and closing costs. Land cost is limited to the lesser of the appraised value of the land or the actual purchase price of the land. Land costs are excluded from project percent calculations.

Site Investigation is also a variable unrelated to construction cost and should include land survey, preliminary soil testing, and environmental and cultural survey costs, but not site preparation. Site investigation costs are excluded from project percent calculations.

Design Services should include full standard architectural and engineering services as described in AIA Document B141-1997. Architectural and engineering fees can be budgeted based upon a percentage of construction costs. Because construction costs vary by region and size, so may the percentage fee to accomplish the same effort. Additional design services such as educational specifications, condition surveys, and post occupancy evaluations may increase fees beyond the recommended percentages.

Recommended: 6-10% (Renovation, complexity of scope, and scale might run 2% higher)

Construction includes all contract work as well as force account for facility construction, site preparation, and utilities. This is the base cost upon which others are estimated and equals 100%.

Equipment/Technology includes all moveable furnishing, instructional devices or aids, electronic and mechanical equipment with associated software and peripherals (consultant services necessary to make equipment operational may also be included). It does not include installed equipment, nor consumable supplies, with the exception of the initial purchase of library books. Items purchased should meet the district definition of a fixed asset and be accounted for in an inventory control system. The Equipment/Technology budget has two benchmarks for standard funding: percentage of construction costs and per-student costs as discussed in DEED's *Guidelines for School Equipment Purchases*. If special technology plans call for higher levels of funding, itemized costs should be presented in the project budget separate from standard equipment.

Recommended: 0-4% of construction cost **or** between $2,300 - $3,800 per student depending on school size and type.

District Administrative Overhead includes an allocable share of district overhead costs, such as payroll, accounts payable, procurement services, and preparation of the six-year capital improvement plan and specific project applications. The maximum for non-project specific indirect administrative costs is 3%, as defined in regulation [4 AAC 31.023(c)(7)]. In-house construction management should be included as part of this line item. The total of in-house construction

management costs and construction management by consultant should not exceed 5% of the construction budget.

Recommended: 2-9%

Percent for Art includes the statutory allowance for art in public places. This may fund selection, design/fabrication and installation of works of art. One percent of the construction budget is required except for rural projects which require only one-half of one percent. For this category, projects are rural if they are in communities under 3,000 or are not on a year-round, publicly-maintained road system and have a construction cost differential greater than 120% of Anchorage as determined in the Cost Model for Alaskan Schools. The department recommends budgeting for art.

Project Contingency is a safety factor to allow for unforeseen changes. Standard cost estimating by A/E or professional estimators use a built in contingency in the construction cost of ± 10%. Because that figure is included in the construction cost, this item is a project contingency for project changes and unanticipated costs in other budget areas.

Recommended: 5% Fixed

Total Project Request is the total project cost, as a percent of the construction cost; except in extreme cases, should average out close to the same for all projects, when the variables of land cost and site investigation are omitted. This item is the best overall gauge of the efficiency of the project.

Recommended: Not to exceed 130%

APPENDIX E: TYPE OF SPACE ADDED OR IMPROVED

Adopted by the Bond Reimbursement & Grant Review Committee
April 20, 2022

Category A - Instructional or Resource

General Use Classrooms
Pre-K and Kindergarten
Elementary
Secondary
Special Education
Art
Science
Bi-Cultural/Bilingual
Consumer Education
Computer/Technology Lab
Music/Drama
Career and Technical Education
Library/Media Center
Gymnasium

Category B - Support Teaching

Teacher Workroom/Office
Teacher Breakroom
Counseling/Testing
Educational Resource Storage
Quiet Room

Category C - General Support

Administration
Conference Room
Parent/Community Schools
Nurse/Clinic
Cafeteria
Kitchen/Food Service
Student Store
Fitness Room
Locker Room/Showers
Student Commons
Multipurpose Room
Auditorium (& Stage)
Pool

Category D - Supplementary

Corridors/Vestibules/Entries
Stairs/Elevators
Restrooms/Toilets
Custodial
Supply/Food Storage
Refer/Freezer
Maintenance/Receiving
Mechanical/Electrical
Telecom/Server Room

APPENDIX F: DEFINITIONS OF MAINTENANCE

Adopted by the Bond Reimbursement & Grant Review Committee
April 20, 2022

Building System(s)
An assembly of components created to perform specific functions in a facility (ref. DEED *CostFormat* for descriptions of 11 standard building systems).

Capital Renewal or Replacement
A scheduled and anticipated systematic upgrading or replacement of a building system or component, anticipated based on life-expectancy, to establish its ability to function for a new life cycle—typically at least five years.

Commissioning
A systematic process of testing buildings systems to ensure that a building performs in accordance with the design intent, contract documents, and the owner's operational needs. Retro-commissioning is commissioning of building systems that occurs on a facility that has never been commissioned, or occurs after an initial commissioning, to recalibrate building performance to ensure optimal systems performance.

Component
An item within a building system that provides a function distinct from other elements in that system.

Corrective Maintenance
Unscheduled maintenance or repair in response to system or component failures that are accomplished at an operational level.

Custodial Care
The day to day and periodic cleaning of building surfaces and fixtures needed to maintain a facility in safe, clean, and orderly condition; includes the replacement of disposable supplies and building items.

Deferred Maintenance
Maintenance or capital renewal that is postponed for lack of funds, resources, or other reasons.

Energy Audit and Assessment
An assessment of a building that review current energy consumption and identifies energy efficiency measures that you can conduct to make the building more energy efficient.

Energy Benchmarking
Measuring building energy performance against its own past performance or against other buildings with a similar function/use.

Energy Consumption Monitoring
Measuring, recording, and tracking use of energy utilities by a building. Required to be done on a monthly basis.

Energy Efficiency Measures
Upgrades, retrofits, or repairs of systems or software or a practice that, when implemented, results in reduced energy use while maintaining the same or higher level of service.

Major Maintenance

Facility renewal that requires major repair or rehabilitation to protect the structure, correct building code deficiencies, or achieve an operating cost savings, and shall exceed $50,000 per project, per site. It must be demonstrated, using evidence acceptable to the department that (1) the district has adhered to its regular preventive, routine, and/or custodial maintenance schedule for the identified project request, and (2) preventive maintenance is no longer cost effective.

Preventive Maintenance

The regularly scheduled activities that carry out the diagnostic and corrective actions necessary to prevent premature failure or maximize or extend the useful life of a facility and/or its components. It involves a planned and implemented program of inspection, servicing, testing, and replacement of systems and components that is cost effective on a life-cycle basis. Programs shall contain the elements defined in AS 14.11.011(b)(4) and 4 AAC 31.013 to be eligible for funding.

Routine Maintenance

Light maintenance and inspection tasks performed at regular intervals (daily, weekly, monthly, etc.). Differentiated from preventive maintenance by level of complexity, specialized skill, and duration of effort.

APPENDIX G: INFORMATION REGARDING PARTICIPATING SHARE & IN-KIND CONTRIBUTIONS OR REQUEST FOR FULL WAIVER

Adopted by the Bond Reimbursement & Grant Review Committee
April 23, 1999

Current law – AS 14.11.008(d) - requires that a district provide a participating share for all school construction and major maintenance projects funded under AS 14.11. The department administers all funds for capital projects appropriated to it under the guidelines of AS 14.11 and 4 AAC 31. The following points should be considered by those districts requesting a waiver of the local participating share.

1. A district has three years before and after the appropriation to fulfill the participating share requirement.

A review of the annual financial audits and school district budgets indicate that no district is in a financial condition which warrants a full waiver. Local dollars are available to fund all or a portion of the match during the six years. Districts continue to generate and budget for, local interest earnings, facility rental fees, and other forms of discretionary revenue adequate to fund some or all of the required local match. If properly documented and not already funded by AS 14.11, prior expenditures for planning, design, and other eligible costs may be sufficient to meet the match requirement.

2. Both the administration and the Legislature have strong feelings that local communities should at least be partially engaged in the funding of projects.

In recognition of the inability of some communities to levy a tax or raise large amounts of cash from other sources, the legislation provides an opportunity for in-kind contributions, in lieu of cash. All districts need to make a directed effort to provide the local match, utilize fund balances and other discretionary revenue, consider sources of in-kind contributions, document that effort, and then request a full or partial waiver, as necessary.

3. All waiver requests require sufficient documentation.

Requests should be accompanied by strong, compelling evidence as to overall financial condition of the school district and in the case of a city/borough school district, the financial condition of the city/borough as well. The attachments should include, at a minimum, cash account reconciliations, balance sheets, cash investment maturity schedules, revenue projection, cash flow analysis and projected use of all fund balances and documentation in support of attempts to meet the local match. Historical expenditures do not provide sufficient evidence of future resource allocations. Consideration should be given to new and replacement equipment purchases, travel, and other expenditures that support classroom activity, but may be delayed until the local match is funded. Each district has an opportunity to help itself and provide a safe, efficient school facility through shared responsibility.

4. Districts may request consideration of in-kind contributions of labor, materials, or equipment.

Under regulation 4 AAC 31.023(d), in-kind contributions are allowed. This also affords an opportunity for community participation through contributions to the art requirements for new buildings or other means. This option should be fully explored, as well as the documentation mentioned above, prior to requesting a waiver of all or part of the participating share.

Alaska Department of Education & Early Development
Capital Improvement Project Application
Project Eligibility Checklist

Date:

District: Project:

Is the project eligible based on below checklist? Yes ☐ No ☐

The following items are requirements for projects to be eligible for grants or bond reimbursement as required by statute or regulations. Please check YES or NO if project application is in compliance or not.

Item	Primary Application Question(s)	Eligibility Item Description	Yes	No
A	All	The application is complete and all questions are fully answered – AS 14.11.013(c)(3)(A)		
B	2a	The district's CIP-6 year plan has been submitted – AS 14.11.011(b)(1) Project is identified in the current CIP year of the plan.		
C	2b	The district has an auditable fixed asset inventory system – AS 14.11.011(b)(1)		
D	2c	Evidence of replacement cost property insurance – AS 14.11.011(b)(2)		
E	8f	If the district has requested a waiver of participating share, is the request attached? (If not applicable, leave blank) – AS 14.11.008(d)		
F	2d & 3d	Evidence that project should be a capital improvement project and not preventive maintenance or custodial care – AS 14.11.011(b)(3)		
G	3d	Evidence that project meets the criteria of one of the A-F categories – AS 14.11.013 (a)(1)		
H	3d, 4a, & Sec. 7	A detailed scope of work, project budget, and documentation of need – AS 14.11.011 (b)(1)		
I	3d, Sec. 7, & 8c	The scope of work should include all information requested in the application instructions and should include life cycle cost analysis, cost benefit analysis or any other quantifiable analysis, as needed, which demonstrates that the project is in the best interest of the district **AND** the state – AS 14.11.013(c)(3)(C)		
J	5a, 5b, 5c, 5d, 5e, 5f, & 5g	For projects requesting additional space, evidence of space eligibility based on supported 2-year and 5-year-post-occupancy student population projection data – 4 AAC 31.021(c)(1)&(c)(3)		
K	3d, 4a, 5h, 8b, & 8c	Evidence that the existing facility can not adequately serve or that alternative projects are in the best interest of the state – AS 14.11.013(c)(3)(B)		
L	5h & 8c	Evidence that the situation can not be relieved by adjusting service area boundaries and transportation – 4 AAC 31.021(c)(2) & AS 14.11.013(b)(6)		
M	2e & Sec. 9	DEED certification that the school district has a facility management program that complies with 4 AAC 31.013 and a description of the district's preventive maintenance program – AS 14.11.011(b)(1)		
N	All	Adequate documentation supporting the project request – AS 14.11.013(c)(3)(A) and 4 AAC 31.022(d)(1)		

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

Adopted by the Bond Reimbursement and Grant Review Committee

District: _____ Project Title: _____
Fund: _____
Rater: _____ CIP ID Number: _____ Category: _____
Date: _____ Ineligible: _____

Formula Driven Scoring Criteria	School Construction A, B, F	Major Maintenance C, D, E
1. Preventive maintenance program (Questions 9b - 9d, 9f)		
A. Detailed summary reports of maintenance labor parameters (9b) 15 points	/15	/15
B. Detailed summary reports of PM/corrective maintenance parameters (9c) 10 points	/10	/10
C. The 5-year average expenditure for maintenance divided by the 5-year average insured replacement value, district wide. (9d) 5 points If % < 4, then (% x 1.25); If % > 4, then 5	/5	/5
D. Energy consumption reports (9f) 5 points	/5	/5
2. District ranking (Question 3a) Only eligible project requests are used to calculate ranking points Project #1 request = 30 points, #2 = 27 points, #3 = 24 points, Each additional project 3 points less	/30	/30
3. Weighted average age of facility (Question 3b) A. 0-10 years = 0 points B. > 10 ≤20 years = .5 / year in excess of 10 years C. > 20 ≤30 years = 5 + .75 per year in excess of 20 years D >30≤40 years = 12.5 + 1.75 per year in excess of 30 years E. > 40 years = 30 points	/30	/30
4. Condition/Component Survey (Question 6a) Condition survey = 0, 3, 5, 8, or 10 points	/10	/10
5. Use of Prior Design Plans or Buildings System Design (Questions 6b-6c) A. Prior Design Plan (school construction only) (6b) = 0, 2, 4, 6, 8, or 10 points OR B. District standard = Two points each system: Building Envelope, Plumbing, HVAC, Lighting, Power	/10	/10
6. Planning & design phase has been completed (Question 6d-6g and Appendix B) A. All required elements of planning = 10 points B. All elements planning + required elements of schematic design = 20 points C. All elements of planning and schematics + required elements of design development = 25 points	/25	/25
7. Previous AS 14.11 funding for this project (Questions 8e & 7a) Previous funding = 30 points, No previous funding = 0 points	/30	/30
8. Unhoused students today (Questions 5a-5g) A 100 % of capacity = 0 points B. > 100% of capacity = One point for each 3% of excess capacity C. 250 % of capacity = 50 points	/50	N/A
9. Unhoused students in seven years (5 year Post-occupancy) (Questions 5a-5g) Unhoused due to loss of eligible square footage based on external environmental factors is scored at half of the points identified. A 100 % of capacity = 0 points B. > 100% of capacity = One point for each 5% of excess capacity C. 250 % of capacity = 30 points	/30	N/A
10. Type of space added or improved (Question 5j) A. Instructional or resource 30 points B. Support teaching 25 points C. Food service, recreational, and general support 15 points D. Supplemental 10 points	/30	N/A
Formula-Driven Total Points	**/280**	**/170**

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

Adopted by the Bond Reimbursement and Grant Review Committee

District: _____ Project Title: _____
Fund: _____
Rater: _____ CIP ID Number: _____ Category: _____
Date: _____ Ineligible: _____

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

Evaluative Scoring Criteria	School Construction A, B, F	Major Maintenance C, D, E
1. Effectiveness of preventive maintenance program (Question 9)		
A. Maintenance Management Narrative (9a)	/5	/5
B. Energy Management Narrative (9e)	/5	/5
C. Custodial Narrative (9g)	/5	/5
D. Maintenance Training Narrative (9h)	/5	/5
E. Capital Planning Narrative (9i)	/5	/5
2. Seriousness of life/safety and code conditions (Question 4a)	/50	/50
3. Reasonableness & completeness of cost or cost estimate (Questions 7a-7c)	/30	/30
4. Emergency conditions (Question 8a) Did application check "yes"? ☐ Did discussion support emergency status? ☐	/50	/50
5. Existing space fails to meet or inadequately serves existing or proposed elementary or secondary programs (Question 8b)	/40	/5+
6. Thoroughness in considering a full range of options for the project (Question 8c)	/25	/25
7. Relationship of the project cost to the annual operational cost savings (Question 8d)	/30	/30
8. Thoroughness in considering use of alternative facilities to meet the needs of the project (Question 5g)	/5	N/A
Evaluative Total Points	**/255**	**/215**

Guidelines for Raters of the CIP Application

Introduction

The Department of Education & Early Development is charged with the task of compiling a prioritized list of projects to be used in preparing a six-year capital plan for submittal to the governor and the legislature (AS 14.11.013(a)(3)). The criteria for accomplishing the priorities are established in statute (AS 14.11.013(B)) and are awarded points based on a scoring system developed by the Bond Reimbursement and Grant Review Committee under its statutorily imposed mandate (AS 14.11.014(b)(6)).

The guidelines provided here are to assure that raters are using a common set of terms and standards when awarding points for the evaluative scoring criteria.

Basis for Rating Applications

The following positions will define the base philosophy for rating applications.

Since districts are required to submit a request for a capital project no later than September 1 of the year preceding the fiscal year for which they are applying, no rater shall review, rank, or give feedback regarding scoring a project prior to this deadline.

Applications will be ranked based on the information submitted with the application, or applicants may use information submitted to the department in support of a project, provided the submission occurs on or before September 1 and is identified as an attachment to an application. Each rater shall arrive at the initial ranking of each project independently. Raters will be expected to go through each application question by question. They will also review all attachments for content, completeness, and bearing on each scoring element. Consistency in scores from year-to-year shall be considered. It is expected that projects will demonstrate different levels of completeness in descriptions and detail depending on the stage of project development.

Projects are prioritized in two lists, the School Construction List and the Major Maintenance List, and reflect the two statutory funds established for education capital projects. Under the definitions provided in statute and regulation, projects which add space to a facility are classed as School Construction projects and must fall in categories A, B, F, or G. Major maintenance projects (categories C, D, and E) may not include additional space for unhoused students. Only projects in which the primary purpose is Protection of Structure, Code Compliance, or Achieve an Operating Cost Savings, where the work includes renewal, replacement, or consolidation of existing building systems or components, should be considered as maintenance projects.

Each rater should have an eligibility checklist available during rating. Eligibility items A, F, G, I, J, L, and N will be evaluated by each rater. Other eligibility items will be the responsibility of support team members doing data input and capacity/allowable calculations. Discussion regarding project eligibility should be brought to the attention of the rating team as soon as it becomes an issue in one person's mind.

Evaluative Rating Guidelines

For each of the evaluative rating categories, raters will consider the factors listed when evaluating and scoring applications. The list is not exclusive, nor exhaustive. As raters read and evaluate projects, review of the listed elements is to be done for referential purposes. Raters should also refer to the Application Instructions for each question.

Code deficiencies / Protection of structure / Life safety

(Application Question 4a; Points possible: 50)

- Points will be assigned for code deficiency, protection of structure, or life safety conditions when the application documents the deficiency, the need for correction, and how the project corrects the deficiency. A condition may only receive points in one scoring condition area.
- Simply identifying a condition in the application will not necessarily generate points. A well-described and documented condition that provides for full evaluation and point awards will include specificity, with attached documentation to support the narrative.
- Age of building system is considered based on the calendar year in which the project would receive funding.
- A project can address a single condition or multiple conditions. Evaluate the severity of each condition. Incremental point adjustments from those provided in the below matrix may be provided for the age of the system, severity, the nature of the item, and effect on the school facility.
- A 3-point increase should be provided if a code deficiency is documented and cited by an appropriate qualified entity or enforcement authority. The most common conditions are noted with an asterisk ("*") in the matrices.
- Does the project scope combine severe and non-severe or critical and non-critical conditions? Inclusion of unrelated non-severe or non-critical conditions in a project will reduce the overall score of the project based on a percentage of project cost.
- Points for mixed-conditions can total more than the possible points. Combined points are weighted using a ratio of construction cost for correcting scored conditions to the total requested construction cost of the project except for any code condition where the percentage of its cost to the average of cost of all conditions is less than half of the percentage of its points to the average of all condition points. In that case, the weighting is shifted to the percentage of the condition cost to the total project cost increased by a percentage of condition points to total condition points. In no case will less than 0.5 point be assigned to a condition.
- Per 4 AAC 31.022(c)(8), scoring of mixed-scope projects will be weighted.

Points will be assigned using the following suggested guidelines.

Structural Condition Issue	Pts
Seismic - no restrictions	3
Foundation/Floor - no PE	4
Seismic - minimal restrictions	6
Upper Floor Structure - no PE	9
Vertical Structure - no PE	9
Roof Structure - no PE	10
Foundation/Floor - PE	15
Seismic - moderate restriction	15
Upper Floor Structure - PE	20
Vertical Structure - PE	20
Roof Structure - PE	24
Seismic Partial Closure[1]	28
Seismic Full Closure[1]	50

Roof/Envelope Condition Issue	Pts
Siding Failure, age <25yr	2
Siding Finish	2
Doors, age >20yr	3
Roof, age >Warranty +5yr [3]	3
Roof, age >Warranty +10yr [3]	6
Roof Leaks WO <3/yr [2]	8
ASHRAE 90.1 Windows [4]	8*
ASHRAE 90.1 Insulation [4]	10*
Siding Material, age >25yr	12
Windows, age >30yrs	12
Siding Failure, age >25yr	15
Roof Leaks, WO >3/yr [2]	15
Doors w/ Egress issues	15*
Roof Leaks affect space, w/ WO documentation	25

Arch/Interior/ADA Condition Issue	Pts
ADA - 1 category	1
ADA - 2 categories	2
DEC Sanitation	2
ADA - 3 categories	3
Ceiling Finishes age >25yr	3
Wall Finishes age >25yr	3
ADA – 4+ categories	4
Elevator Issues	3
Floor Finishes >15yr	4
Elevator Violations	7
Building Egress	10*
Rated Assemblies	12*

Mechanical Condition Issue	Pts
Controls, DDC Deficiency	3
Mech. System Narrative, age >30yr	4
Ventilation, WO <3/yr^2	5
Plumbing, WO <3/yr^2	6
Heating, WO <3/yr^2	7
Controls, Pneumatic	8
Ventilation, WO >3/yr^2	9
Plumbing, WO >3/yr^2	10
Heating, WO >3/yr^2	11
Ventilation, Codes	12*
Plumbing, Codes	12*
Heating, Codes	13*
Boilers, 1 of 2 Non-op	13
HVAC age >40yr	15
Boilers, 2 of 3 Non-op	18
Mechanical System, WO >5/yr^2	21
Heating Failure	25

Electrical Condition Issue	Pts
Lighting, Narrative, age >25yr	2
Electrical, Narrative, age >30yr	4
Power, WO <3/yr^2	4
Lighting, WO <3/yr^2	4
Back-up Generator In-operable	5
Egress/EM lights, WO <3/yr^2	5
Power, WO >3/yr^2	7
Lighting, WO >3/yr^2	7
Egress/EM lights, WO >3/yr^2	8
Intercom Issues, WO >3/yr^2	7
Lighting, Codes	10*
Power, Codes	10*
Intercom Failure	10
Electrical, age >40yr	15
Lighting Levels, <50% of code	16
Electrical System, WO >5/yr^2	21
Power Failure	25

Fire Alarm/Sprinkler Condition Issue	Pts
Fire Alarm, Narrative, age >15yr	2
Sprinkler, Narrative, >30yr	2
Sprinkler Heads Failing, age >30yr	5
Sprinkler Coverage Gaps	5*
FA Non-addressable	6*
FA/Sprinkler, WO >1/yr^2	8
Sprinkler Heads Failing, age >40yr	10
FA/Sprinkler, WO >3/yr^2	15
Fire Alarm Non-op, <3 floors	17
FA/Sprinkler, WO >5/yr^2	20
Fire Alarm Non-op, >3 floors	25
Sprinkler Non-op	30

Site Condition Issue	Pts
Vehicle Surfaces	3
Walkways and Surfaces	4
Drainage Issues	6
Playground Code	12
Power Issues	15*
Wastewater Issues	15*
Water Issues	16*
Wastewater Failure	24
Water Failure	25

UST/AST/HazMat Condition Issue	Pts
HazMat (all) Low Exposures	3*
UST, Narrative, age >30yr	2
AST, Narrative, age >40yr	5
Sewage Lagoon Failure/ Exposure	5
UST/AST Leak	7
UST/AST USCG/40 CFR Cite	10
HazMat (all) Mod Exposures	10*
HazMat (all) High Exposures	22*

Definitions:
PE = documented by a Professional Engineer
No PE = not documented by a Professional Engineer
WO = Work Orders provided w/ application

Notes:
[1] If district does not qualify for space, points limited to 15.
[2] Average of prior 3 years, provide work orders. See application instructions.
[3] Provide copy of roof warranty.
[4] Provide existing R-value or code violation of system.

Regional community facilities
(Application Question 5h; Points possible: 5)

- Is a community "inventory" provided?
- Where reasonable alternative facilities have been identified, is there documentation with the facility owner regarding availability?
- Consider the effort/results in identifying alternative facilities and the rationale behind the viability of the alternative facility.
- Were judgments about the viability of alternate facilities made with "institutional knowledge", professional assessment, third party objectivity, and/or economic analysis?
- Are facilities listed in a narrative discussion or are they documented with supplemental data such as photos, maps, facility profile, etc.?
- This point category is only applicable to construction projects.

Points will be assigned in increments using the following suggested guidelines:

Scoring Criteria	Point Range
A community inventory is provided and reasonable alternative facilities have been identified. The rationale behind the viability of the alternative facilities has been provided and judgments are made using institutional knowledge, third party objectivity, economic analysis, etc. The narrative discussion is documented with photos, maps, facility profiles, etc.	5 points
A community inventory is provided and reasonable alternative facilities have been identified. The rationale behind the viability of the alternative facilities has been provided and judgments are made using institutional knowledge, third party objectivity, economic analysis, etc.	4 points
A community inventory is provided and reasonable alternative facilities have been identified. The rationale behind the viability of the alternative facilities has been provided.	3 points
A community inventory is provided and reasonable alternative facilities have been identified.	2 points
A community inventory is provided.	1 point
Question has not been answered	0 points

Cost estimate for total project cost
(Application Questions 7a - 7c; Points possible: 0-30)

- Check to assure that the estimate matches the proposed project scope.
- Primary evaluation should test both the "reasonableness" and the "completeness" of the cost estimate (i.e., How well can this estimate be used to advocate for this project?).
- Check for double entries, including factored items, cost after adjustment for geographic factor, and percentages and justification (with backup) when percentages exceed DEED guidelines.
- Review and evaluate backup for cost estimate including lump sum or actual construction costs.
- Rating considers the full range of estimates: from conceptual to detail design to actual construction costs. It should be noted that because this scoring element covers the full range of estimate possibilities, it is anticipated that conceptual estimates score less than more detailed construction estimates and actual construction cost documentation.
- Completed project costs are supported by competitive selection documentation, and DEED-approval of in-house labor or an alternative procurement method, as needed.

Points reflect the reasonableness and completeness evaluation and will be assigned in increments using the following suggested guidelines:

Scoring Criteria	Point Range
The estimate matches the scope of work, is reasonable and complete with no double entries, adjustments are accurate, justification and backup is provided when estimate exceeds DEED guidelines, and all lump sums amounts are described and supported. The estimate is based on construction document level cost estimate, bid tabulations, or actual invoices.	27-30 points
The estimate matches the scope of work, is reasonable and complete with no double entries, adjustments are accurate, justification and backup is provided when estimate exceeds DEED guidelines, and all lump sums amounts are described and supported. The estimate is based on 65% design development level specifications and drawings.	23-26 points
The estimate matches the scope of work, is reasonable and complete with no double entries, adjustments are accurate, justification and backup is provided when estimate exceeds DEED guidelines, and all lump sums amounts are described and supported. The estimate is based on 35% schematic design level documents.	18-22 points
The estimate matches the scope of work, is reasonable and complete with no double entries, adjustments are accurate, justification and backup is provided when estimate exceeds DEED guidelines, and all lump sums amounts are described and supported. The estimate is based on concept design level documents. The DEED demand cost model is acceptable as a planning/ concept level cost estimate.	12-17 points
The cost estimate is not adequately developed to support concept level costs. Components may not be present to confirm scope of work, reasonableness and completeness or other elements. Project may be at an early preliminary stage.	6-11 points
Construction costs are not supported or many cost elements are missing.	1-5 points

Emergency conditions
(Application Question 8a; Points possible: 50)

- If the district doesn't declare the project an emergency, points will not be awarded.
- Consider the ranking of the project on the district six-year plan.
- Consider the "level of threat" to both people and property in assessing the emergency.
- Consider the "nature" of the emergency.
- Consider the "impact" on the use of the facility due to the emergency condition.
- Consider the "immediacy" of the emergency (how time critical is it?).
- Consider the level of description and documentation provided.
- Consider whether the description provided is congruent with other application elements.
- Does the project scope include non-emergency conditions? Scoring of mixed-scope projects, which address both emergency and non-emergency conditions, should be weighted based on the amount of emergency work that is included in the project.
- Nothing in this scoring element should restrict a system with premature failures from being assigned points when the conditions for assigning points in that category are met.

Points will be assigned in increments according to the level of threat using the following suggested guidelines. High threat emergency projects with high emergency points are infrequent.

Scoring Criteria	Point Range
Building is destroyed or rendered functionally unsafe for occupancy and requires the building to be demolished and rebuilt. The emergency narrative is supported by documentation that addresses the immediacy of the emergency, the circumstances of the loss of the building, and that the students are currently unhoused.	50 points
Building is unsafe and the entire student population is temporarily unhoused. The building requires substantial repairs to be made safe for the student population to occupy the building. The emergency narrative is supported by documentation that addresses the immediacy of the emergency and the narrative explains any mitigation the district has taken to address the emergency.	25-45 points
Building is occupied by the student population. A local or state official has issued an order that the building will need to be repaired by a certain date or the district will have to vacate the building. The emergency narrative is supported by documentation from the local or state official providing the date when the repairs need to be completed. The documentation addresses the immediacy of the emergency and the narrative explains any mitigation the district has taken to address the emergency.	5-25 points
A portion of the building requires significant repair or replacement of damaged portion of building. The damaged portion of the building cannot be used for educational purposes. The emergency narrative is supported by documentation that addresses the immediacy for the emergency, the circumstances surrounding the damaged portion of the building, and the portion of the building that is not available for educational purposes.	5-45 points

Scoring Criteria	Point Range
A major building component or system has completely failed and is no longer repairable. The failed system or component has rendered the facility unusable to the student population until replaced. The emergency narrative is supported by documentation that addresses the immediacy of the emergency, the circumstances of the failure, and that the students are currently unhoused.	25-45 points
A major building component or system has a high probability of completely failing in the near future. The component or system has failed, but has been repaired and may have limited functionality. If the component fails the district may be required to restrict use of the building until the component or system is repaired or replaced. The emergency narrative is supported by documentation that addresses the high probability of the failure and documents the requirement to restrict use of the building until corrected.	5-25 points

Inadequacies of Existing Space
(Application Question 8b; Points possible: 40)

- Scoring is based on the described and documented inability of existing space to adequately serve the instructional program. Points are not awarded for code violations.
- Consider the adequacy of the space in terms of both form and function, crowding, and upgrades to space that support the instructional program.
- Balance consideration of educational adequacy of physical arrangement versus functional factors.
- Scoring should take into consideration whether the inadequate space is for a mandatory instructional program or a new or existing local program.
- Does the project include improvements to functionally adequate space? Scoring of projects with functionally adequate space and inadequate space should weight the amount of work improving inadequate space that is included in the project.

Points will be assigned in increments using the following suggested guidelines:

Scoring Criteria	Point Range
The existing space as described and documented is significantly inadequate to meet state mandated instructional programs, facility is severely overcrowded, and the project is to add or upgrade state mandated instructional space. Documentation such as a condition survey, design narrative, or space calculations can be used to support the inadequacies of the existing space.	25-40 points
The existing space as described and documented is not adequate to meet state mandated or proposed new or existing local instructional programs, facility is moderately overcrowded, and the project is to add or upgrade state mandated instructional or proposed new or existing local instructional space. Documentation such as a condition survey, design narrative, or space calculations can be used to support the inadequacies of the existing space.	11-24 points

Scoring Criteria	Point Range
The existing space as described and documented is not adequate to meet state mandated or proposed new or existing local instructional programs, facility has minor or no overcrowding, and the project is to add or upgrade state mandated instructional or proposed new or existing local instructional space.	1-10 points
A major maintenance project that describes and documents the inadequacy of the existing space that is an additional condition being addressed in the project.	0-5 points

Other options
(Application Question 8c; Points possible: 25)

- Consider how completely this topic is addressed. Does the discussion provide alternatives and details that support a strong vetting of the project options?
- Consider the range of options considered and the rigor of the comparison to each other. Does the comparison of options support the project chosen?
- Scoring should increase in accordance with the amount of detailed information; graduated into three levels of: 1) unsupported narrative, 2) well supported narrative, and 3) detailed cost analysis.
- Consider boundary changes where applicable.
- For installed mechanical equipment, was a re-conditioned or re-built option considered in lieu of new?
- For over-crowding, was double shifting or other alternatives considered?

Points will be assigned in increments using the following suggested guidelines:

Scoring Criteria	Point Range
Were the options considered viable alternatives? The options are fully described viable options that are supported by a life-cycle cost analysis and cost benefits analysis that compare the cost of the options; an explanation is provided for the rationale behind the selection of the preferred option. Documentation is submitted that supports the options, analysis, and conclusion. The options contain the proposed project and at least two other viable options.	21-25 points
The options are fully described viable options that include cost comparisons between options. An explanation is provided for the rationale behind the selection of the preferred option; however, no life cycle cost analysis is included. Documentation is submitted that supports the options, analysis, and conclusion. The options contain the proposed project and at least two other viable options.	11-20 points
A description is included for each option; however, the options are not supported with additional documentation or cost analysis. The options contain the proposed project and at least one other viable option.	1-10 points

Annual operating cost savings
(Application question 8d; Points possible: 30)

- This should be rated based on information provided which specifically address this issue.
- Evaluation should be based on district provided data and analysis rather than opinion.
- Top scores should be reserved for those projects that can demonstrate a payback within a relatively brief period of time.
- Should be consistent with life cycle cost analysis and cost benefit analysis (if provided). This may have either a positive or a negative relationship to justification of a project.
- Evaluation may reward efforts to contain or reduce operating costs even if the project doesn't save money or have a payback (i.e. – utilizing LEED or CHPS standards for construction).

Points will be assigned in increments using the following suggested guidelines:

Scoring Criteria	Point Range
A detailed breakdown of projected annual operational cost savings compared to the project cost. The analysis should be consistent with a life cycle cost analysis or cost benefit analysis which is submitted with the project. The projected operational cost savings have a documented, detailed payback of 10 years or less.	21-30 points
A detailed breakdown of projected annual operational cost savings compared to the project cost. The analysis should be consistent with a life cycle cost analysis or cost benefit analysis which is submitted with the project. The projected operational cost savings have a documented, detailed payback of between 10 and 20 years.	11-20 points
A summary analysis that includes a projected annual operational cost savings compared to the project cost. The projected operational cost savings documents efforts to contain or reduce operating costs and has a payback that exceeds 20 years.	6-10 points
Stated opinion regarding estimated cost savings that could be achieved with the project.	1-5 points

District preventive maintenance and facilities management
(Application Questions 9a, 9e-9h; Points possible: 25 evaluative)

Maintenance Management Narrative

(Application Question 9a; Points possible: 5)

- Does the described program address preventive maintenance as well as routine?
- How well does the program work for each individual school?
- Does the program address all building components? Mechanical, electrical, structural, architectural, exterior/civil? (Note: components as used here and below may also be referred to as 'equipment'.)
- Is there evidence supplied which demonstrates that the program is effective?
- Who participates in the program and how does it function?

Scoring Criteria	Point Range
Narrative fully describes the maintenance management (MM) program and all of the following: maintenance structure and staffing, the work order program and process including work order classification, scheduling, tracking, and completion or deferral; how work orders are initiated and by whom; how component work order history and trends are used. Provides sample work order types showing PM, routine maintenance, and corrective work; includes cost of labor and materials. Provides sample component-based work orders (with component ID) that include component-specific checklist of preventive and/or routine maintenance. Provides sample corrective work orders showing progression of scheduling from initial response to completion or deferral. Provides a component report for a minimum of 10% of main school facilities showing the date of installation and date of scheduled renewal or replacement; includes components from each building system listed in DEED's R&R schedule.	5 points
Narrative describes the MM program and all of the following: maintenance structure and staffing, the work order program and process including work order classification, scheduling, tracking, and completion or deferral; how work orders are initiated and by whom. Sample work order types showing PM, routine maintenance, and corrective work; includes cost of labor and materials (where applicable). Sample component-based work orders (with component ID) that include component-specific checklist of preventive and/or routine maintenance.	4 points
Narrative describes the MM program and all of the following: the work order program and process including work order classification, tracking and completion; how work orders are initiated and by whom. Sample work order types showing PM, routine maintenance, and corrective work; includes cost of labor on those work orders, and cost of materials on at least one corrective work order.	3 points

Scoring Criteria	Point Range
Minimal narrative that partially describes the MM program but not all of the following: the work order program and process including work order classification; how work orders are initiated and by whom. Sample work order types showing some, but not all of the types: PM, routine maintenance and corrective work.	2 points
Minimal narrative that partially describes the MM program but not all of the following: the work order program and process including work order classification; how work orders are initiated and by whom. No sample work orders.	1 point
No narrative or an abbreviated narrative that provides no information of how the maintenance management program works. No sample work orders.	0 points

Energy Management Narrative

(Application Question 9e; Points possible: 5)

- Is the district engaged in reducing energy consumption in its facilities?
- Is a comprehensive set of methods being used?
- Is the program districtwide in scope?
- Is the program achieving results?
- Is there a method for reviewing and monitoring energy usage?
- Is there a method for evaluating existing facilities' need for commissioning?

Scoring Criteria	Point Range
Narrative fully describes the Energy Management program including all of the following: district energy policy, program structure including roles, and responsibilities, occupant comfort and safety standards, energy consumption monitoring, benchmarking, energy audits and assessments, and implementation/execution of energy efficiency measures (EEMs). Provides data showing that the program tracks energy usage by facility and calculates an energy use intensity (EUI) for each main school facility over the prior five years—by energy type. Provides an energy management guideline or manual issued/updated within the past five years covering the items above. Provides a report showing a five-year history of implemented EEMs. Provides a complete set of energy consumption records (Application Q.9f).	5 points

Scoring Criteria	Point Range
Narrative describes the Energy Management program including all of the following: district energy policy, program structure including roles, and responsibilities, occupant comfort and safety standards, energy consumption monitoring, and examples of energy efficiency projects or initiatives. Provides data showing that the program tracks energy usage by facility and calculates an energy use intensity (EUI) for each main school facility requiring an RCx analysis over the prior five years—by energy type. Provides an energy management guideline or manual, issued/updated within the past five years, covering the items. Application includes the complete set of energy records was provided for Q.9f.	4 points
Narrative describes the Energy Management program including all of the following: district energy policy, program structure, occupant comfort and safety standards, energy consumption monitoring. Shows that the program tracks energy usage by facility and calculates an energy use intensity (EUI) for each main school facility requiring an RCx analysis over the prior five years—by energy type. Provides an energy management guideline or manual covering the items above. Provides a complete set of energy consumption records (Application Q.9f).	3 points
Narrative has useful description of the Energy Management program including some of the following: program structure, occupant comfort and safety standards, energy consumption monitoring. Shows that the program tracks energy usage by facility (not by campus) and calculates an energy use intensity (EUI) for each facility requiring an RCx analysis over the prior five years—by energy type. A complete set of energy records is not provided (Application Q.9f).	2 points
Narrative has some useful description of the Energy Management program but is not complete; a complete set of energy records is not provided (Q.9f). OR No narrative, but complete set of energy records was provided (Q9.f).	1 point
No narrative or an abbreviated narrative with no useful description of the Energy Management program. No energy records are provided (Q.9f).	0 points

Custodial Narrative

(Application Question 9f; Points possible: 5)

- Is the district's custodial program complete?
- Is custodial program based on quantities from building inventories and frequency of care based on industry practice?
- Has the district customized its program to be specific to each facility?
- Is the program districtwide in scope?
- Is the program achieving results?
- Is the written custodial plan(s) attached?

Scoring Criteria	Point Range
Narrative fully describes the Custodial program including all of the following: custodial policy and purpose, program structure including staffing, roles, and responsibilities, integration with district maintenance processes, worker and occupant safety, adopted custodial standards, and performance verification/quality control. Provides custodial program guideline or manual issued/updated within the past five years covering the items above. Includes information or supplements that are specific to each main school facility and list types and quantities of surfaces and fixtures to be cleaned, and frequency of care for each based on industry practice. Lists staffing requirements for the facility based on these metrics and industry standards for productivity. Provides a report which tabulates the preceding information (types and quantities of information, etc.) for all main schools in the district, including staffing requirements. OR Provides no less than two facility examples each year of submission with no repeats within a five-year period. If the district operates fewer than 10 schools, provides one-third of all facilities each year. Provide at least 5 work orders generated by the custodial program in the previous 12 months. Provides completed sets of quality control and inspection checklists for no less than two facilities for the previous fiscal year period.	5 points
Narrative describes the Custodial program including all of the following: custodial policy and purpose, program structure including staffing, roles, and responsibilities, integration with district maintenance processes, worker and occupant safety, adopted custodial standards, performance verification/quality control. Provides custodial program guideline or manual issued/updated within the past five years covering the items above. Includes information or supplements that are specific to each main school facility and that list types and quantities of surfaces and fixtures to be cleaned, and frequency of care for each based on industry practice; provides no less than two facility examples of the facility-specific information. Provides samples of quality control and inspection checklists.	4 points

Scoring Criteria	Point Range
Narrative describes the Custodial program including all of the following: district custodial policy, program structure including staffing, roles, and responsibilities, and adopted custodial standards. Provides custodial program guideline or manual that is general in nature and not site specific.	3 points
Narrative has some useful description of the Custodial program including some of the following: district custodial policy, program structure including staffing, roles, and responsibilities, and adopted custodial standards.	2 points
Narrative has some useful description of the Custodial program but is not complete.	1 point
No narrative or an abbreviated narrative with no useful description of the Custodial program. No written custodial program guideline or manual.	0 points

Maintenance Training Narrative

(Application Question 9g; Points possible: 5)

- Does the program address training and on-going education of the maintenance staff?
- Are maintenance personnel being trained in specific building systems?
- Are training schedules attached?
- How is Training Recorded?
- How is effectiveness measured?

Scoring Criteria	Point Range
Narrative fully describes the Training program including all of the following: training policy, program structure including roles and responsibilities, identification of training needs for custodians and maintenance personnel, training methods and types, training scheduling and tracking, and measurement of program effectiveness. Identifies individual training needs based on job functions, and building systems supported; identifies training methods and types, and assigns training on an individual basis. Provides a sample analysis of job functions (e.g., driving, work order management, etc.) and required building system knowledge (e.g., boiler tuning, lock-out/tag-out, etc.) for at least one job classification. Provides a training plan, by individual, for training scheduled in the current school year, by training title and method or type. Provides a log of completed training (last 3 years), by individual. Provides an assessment of the effectiveness of the training program which, at a minimum includes data on scheduled versus completed training.	5 points

Scoring Criteria	Point Range
Narrative fully describes the Training program including all of the following: training policy, program structure including roles and responsibilities, identification of training needs for custodians and maintenance personnel, training methods and types, and training scheduling and tracking. Identifies training needs based on job functions, and building systems supported, identifies training methods and types, and assigns training on an individual basis. Provides a training plan, by individual, for training scheduled in the current school year, by training title and method or type. Provides a log of completed training (last 3 years), by individual.	4 points
Narrative describes the Training program including some of the following: training policy, identification of training needs for custodians and maintenance personnel, training methods and types, and training scheduling and tracking. Provides a training plan for training scheduled in the current school year, by training title and/ or type. Provides a log of completed training but not by individual.	3 points
Narrative has some useful description of the Training program but is not complete. Provides training logs that show minimal maintenance or custodial training, primarily HR/OSHA training.	2 points
Narrative has some useful description of the Training program but is not complete. OR Training logs with no actual maintenance or custodial training. Only HR/OSHA training. *Training Logs with only HR/OSHA training can never exceed 1 point.	1 point
No narrative or an abbreviated narrative with no useful description of the Training program. No training logs	0 points

Capital Planning Narrative

(Application Question 9h; Points possible: 5)

- Does the district have a process for identifying capital renewal needs?
- Are component/subsystem replacement cycles identified and used?
- Does the system involve building occupants and users?
- Are renewal schedules comprehensive and vetted for credibility?
- Are systems up for renewal grouped into logical capital projects?
- Does review of projects on six-year plan show evidence of use of capital planning process, including renewal and replacement scheduled.

Scoring Criteria	Point Range
Narrative fully describes the Capital Planning program including all of the following: district capital planning policy, capital planning responsibilities, structure, and staffing, capital needs forecasting based on system renewal and program/population changes, forecast verification (condition assessments, user input, maintenance work order history/trends, etc.), development of CIP projects and 6-yr plans, and identification of capital project resources and funding. Provides capital planning report issued/updated within the past 12 months and 6-yr CIP plan with at least one project in every year of the plan and includes capital projects programmed from all fund sources, local, state, and federal. Provides a Facility Condition Index (FCI) for every main school based on a facility condition assessment not older than five years where FCI has the following formula. $FCI = \frac{\text{Cost of Current and Deferred Renewal}}{\text{Current Replacement Value}}$ Provides a student population projection for a minimum of five years beyond the current fiscal year for every attendance area in the district. Provides a condition assessment for every project requesting state-aid in the first year of the 6-yr CIP plan. Provides a districtwide trend for combined FCI for a minimum of five prior years and tracks districtwide capital expenditures for main schools for a minimum of five prior years.	5 points

Scoring Criteria	Point Range
Narrative describes the Capital Planning program including all of the following: district capital planning policy , capital planning responsibilities, structure, and staffing, capital needs forecasting based on system renewal and program/population changes, forecast verification based on condition assessments, and development of CIP projects and 6-yr plans. Provides capital planning report and 6-yr CIP plan with at least one project in every year of the plan. Provides a Facility Condition Index (FCI) for every main school based on a current DEED Renewal & Replacement Schedule, where FCI has the following formula. $FCI = \frac{\text{Cost of Current and Deferred Renewal}}{\text{Current Replacement Value}}$ Provides a student population projection for a minimum of five years beyond the current fiscal year for every attendance area in the district.	4 points
Narrative describes the Capital Planning program including all of the following: district capital planning policy, capital planning responsibilities, structure, and staffing, capital needs forecasting based on system renewal, development of CIP projects and 6-yr plans. Provides a 6-yr CIP plan with at least one project in every year of the plan.	3 points
Narrative has some useful description of the Capital Planning program but is not complete. Provides R&R documents for all facilities in which state-aid for CIP is listed in the 6-yr plan.	2 points
Narrative has some useful description of the Capital Planning program but is not complete; R&R documents not provided for all required facilities. OR No narrative, but provides R&R documents for all required facilities.	1 point
No narrative or abbreviated narrative with no useful description of the Capital Planning program. Lacks R&R documents for all required facilities.	0 points

Formula-Driven Guidelines

Condition/Component survey
(Application question 6a; Points possible: 0-10 – non-evaluative)

- Condition/component survey age is relative to the earlier of either the application submittal deadline or the project's substantial completion.

Points will be assigned in increments using the following suggested guidelines:

Scoring Criteria	Points
Condition/component survey is a comprehensive product that informs the project. It includes a full description of existing systems, including code deficiencies, and provides recommendations for upgrades related to all deficiencies described. Costs associated with each deficiency and upgrades are provided as applicable. Supplements may be included such as special inspections, engineering calculations, photographs, drawings, etc. Floor plans, with building area designations and room identifications, are encouraged. Portions of the condition survey, such as that information pertaining to building codes and analysis of structural engineered systems, may have been completed by an architect, engineer, or persons with documented expertise in a building system. It is less than 6 years old.	10 points
Condition/component survey contains many of the required elements as listed above, but not all. It is less than 10 years old.	8 points
Condition/component survey informs the project. Supplements such as special inspections, engineering calculations and drawings that would further document conditions justifying the project are not provided or documentation is not substantial. It is less than 10 years old.	5 points
Condition/component survey is more than 10 years old, but may still contain some relevant building information pertaining to the project.	3 points
Condition/component survey has not been submitted or does not inform the project.	0 points

Use of prior school design
(Application Question 6b; Points possible: 10)

- Are complete documents of the proposed reused school plans provided?
- Is evidence of ownership of proposed reused school plans provided?
- Has an analysis been done of the anticipated deviations and revisions from the proposed reused school plan been accomplished? Is an estimated cost of those deviations (+ or -) been computed?
- Have design and construction costs for the proposed reused school plans been estimated along with an estimated cost of design and construction for a project alternative for a new school design?
- This point category is only applicable to construction projects.

Points will be assigned in increments using the following general guidelines:

Scoring Criteria	Points
1. The district or municipality owns the reused school plans. 2. The reused school plans are less than 5years old or have been updated within the prior 5 years. 3. A supported estimate of planned deviations from the reused school plans is less than 1% of the estimated cost of construction. 4. A supported estimate of construction cost savings to the project is greater than 10% of construction costs of a new school plan alternative. 5. A supported estimate of design cost savings to the project is greater than 10% of design services costs of a new school plan alternative.	10 points
Any four of the above factors are achieved.	8 points
Any three of the above factors are achieved.	6 points
Any two of the above factors are achieved.	4 points
Any one of the above factors is achieved.	2 points
None of the above factors are achieved.	0 points

Use of prior building system design
(Application Question 6c; Points possible: 10)

- Up to two points are available for capital renewal of a complete system, a subsystem, or a component renewal in each of the following systems: 1) Building Envelope, 2) Plumbing, 3) HVAC, 4) Lighting, and 5) Power.
- Has evidence been provided that the identified building system is part of a written standard that meets ASHRAE 90.1-2016 prescriptive requirements?
- This point category is not applicable to projects receiving scores for use of a prior school design.

Points will be assigned in increments using the following general guidelines:

Scoring Criteria	Points
The reused building system design is part of a provided written municipal or school district building system standard.	2 points

Design Ratios

S U B C O M M I T T E E R E P O R T

April 7, 2023

Mission Statement

Under AS 14.11.014(b)(3), evaluate and propose construction design ratio guidelines for use by the department, school districts, and the design community to design new and renovated school facilities to reduce first cost (construction) and long-term cost (operation).

Current Members

Dale Smythe, Chair	Michael Spencer, AHFC	Larry Morris, ASD
Randy Williams	Gary Eckenweiler, BSSD	Lori Weed, DEED
	Karen Zaccaro, Stantec	Wayne Norlund, DEED
	Ezra Gutschow, Coffman	

Status Update

The subcommittee did not meet this period, pending the department preparing an initial draft of the public comment packet approved by the BRGR Committee at its February meeting.

The public comment proposal will incorporate the Openings to Exterior Wall (O:EW) and Volume to Gross Square Feet (V:GSF) design ratios into the Exterior Closure section and be accompanied by the following support documents that are in development:

- Cover memo identifying the purpose, background and information, and justification for ratio target and ranges;
- Original recommendation documents;
- Ratio data on existing school designs; and
- Building Energy Modeling Reports, 2019 Original and 2022 Follow Up

Future efforts

Review draft public comment packet.
Review public input and comments when received.

Schedule

No meetings scheduled at this time

School Space

S U B C O M M I T T E E R E P O R T

March 31, 2023

Mission Statement

Review accuracy and adequacy issues relative to the state's space allocation guidelines and recommend updates that support the board of education's mission and vision for Alaska public education.

Current Members

Dale Smythe, Chair
David Kingsland
Scott Worthington
Jobe Bernier
Victor Valenote
Larry Morris
Dana Menendez
Lori Weed
Wayne Norlund
Joe Willhoite

Status Update

Subcommittee members met March 2nd and 30th. Members continued discussions on the definition and measurement of "gross square foot".

On the measurement of square footage, consensus that it should be an industry standard and easy for both design teams and DEED staff to measure. General consensus moving forward is to stay with measurement to the outside of exterior wall but have different formulas for different ASHRAE climate zone requirements or a variance or allowance for additional continuous insulation needs. Subcommittee will continue to meet and develop a formal recommendation.

Future discussion will continue to model and calculate a best-fit percentage to or other determination to account for exterior insulation variations. Additional discussion on evaluating the K-12 space allocation formula and how to equitably accommodate the additional storage and utility needs of remote schools will also occur.

Schedule

April 27, 2023, and every 2 weeks thereafter

Life Cycle Cost Analysis Handbook

P U B L I C A T I O N C O V E R

April 20, 2023

Issue

The department seeks committee approval to send out the draft *Life Cycle Cost Analysis Handbook* for public comment.

Background

Last Updated/Current Edition
Publication last updated in 2018. Current edition available on the department's website: education.alaska.gov/facilities/publications/LCCAHandbook.pdf.

Summary of Proposed Changes
The current proposed edits to the publication include straightforward updates of the prior publication and the addition of commissioning to the cost categories. References to the LCCA requirements in the *Alaska School Design & Construction Standards* were also added. Minor updates to the LCCA Workbook spreadsheet tool were also made to include assumptions for maintenance costs and explanations for items. Public comment included requests to simplify some of the concepts, add an option for Cost Benefit Analysis (CBA), and expound on how commissioning and retro-commissioning fit into LCCA.

BRGR Input and Discussion Items

Below are questions and comments developed by DEED during the revisions of this draft. Outlined below for consideration by the BRGR Committee:

- Do the proposed edits ad clarity to the publication? Are the concepts presented sufficiently explained?
- Do the proposed edits sufficiently address the addition of commissioning?
- Are the references to the *Alaska School Design & Construction Standards* adequate or is additional explanation required?
- Do the additions for maintenance cost assumptions and explanations of line items add sufficient clarity?
- Is the addition of an option for CBA appropriate? CBA is a more involved process than LCCA and it is not clear that this option would provide a simpler analysis process.

Options

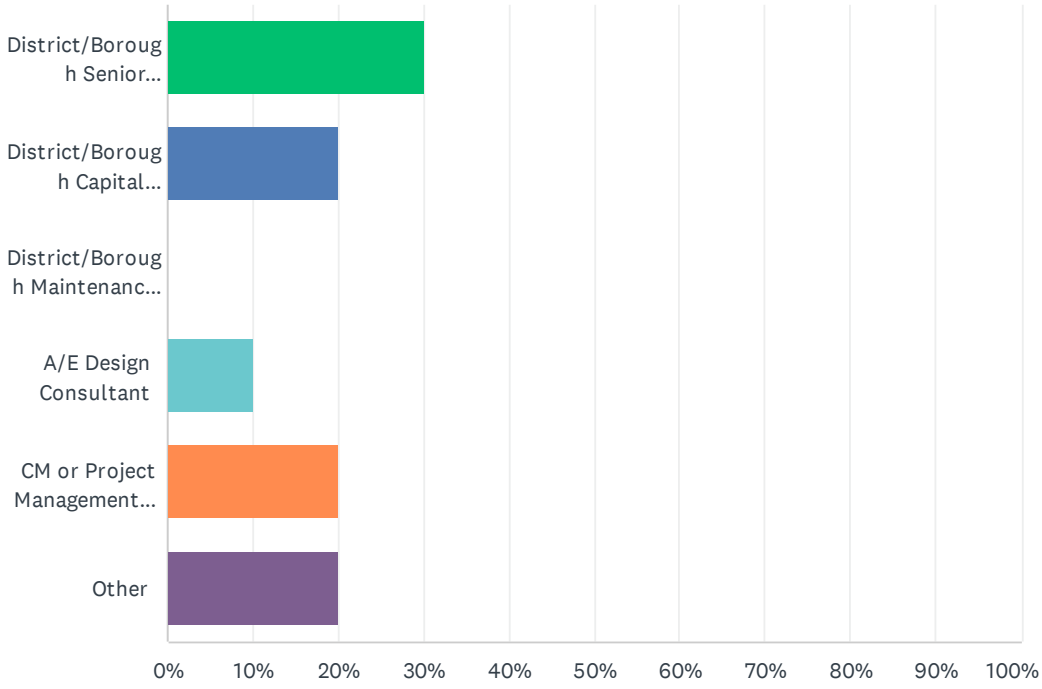
Approve draft handbook and associated tool for public comment.
Amend draft handbook and associated tool and approve for public comment.
Request additional changes by the department for consideration by the committee.

Suggested Motion

"I move that the Bond Reimbursement and Grant Review Committee recommend the department update the draft publication of the *Life Cycle Cost Analysis Handbook* as presented and open a period of public comment."

Q1 Which of the following best describes your role in relation to school facilities.

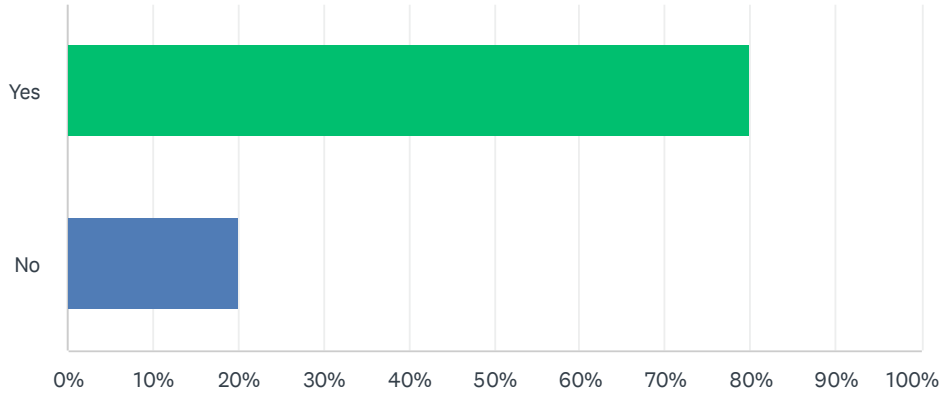
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
District/Borough Senior Management	30.00%	3
District/Borough Capital Projects Staff	20.00%	2
District/Borough Maintenance & Operations Staff	0.00%	0
A/E Design Consultant	10.00%	1
CM or Project Management Consultant	20.00%	2
Other	20.00%	2
TOTAL		10

Q2 In the past five years, have you had an opportunity to use the publication in any aspect of school capital project planning, design, construction, or operations?

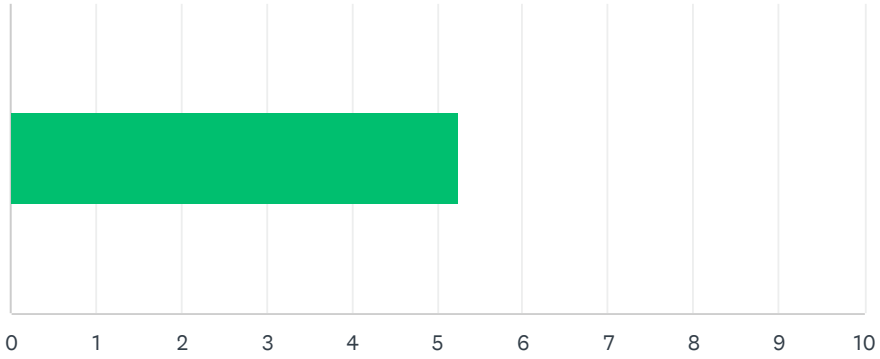
Answered: 5 Skipped: 5



ANSWER CHOICES	RESPONSES	
Yes	80.00%	4
No	20.00%	1
TOTAL		5

Q3 If Yes above, approximately how many projects?

Answered: 4 Skipped: 6

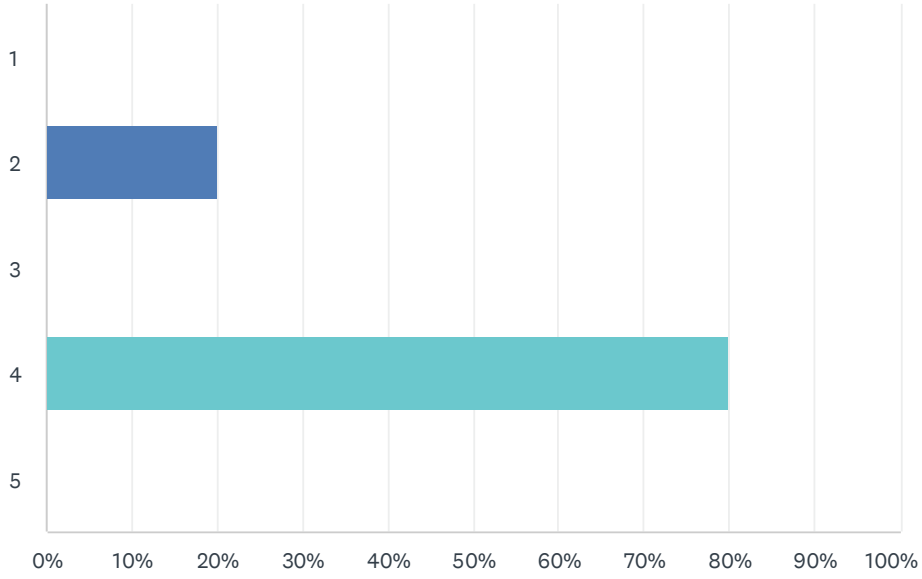


ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	5	21	4
Total Respondents: 4			

#		DATE
1	4	3/13/2023 9:59 AM
2	4	3/10/2023 3:20 PM
3	10	3/10/2023 8:02 AM
4	3	3/10/2023 7:51 AM

Q4 In your opinion, how useful is this publication? 1-low, 5-high

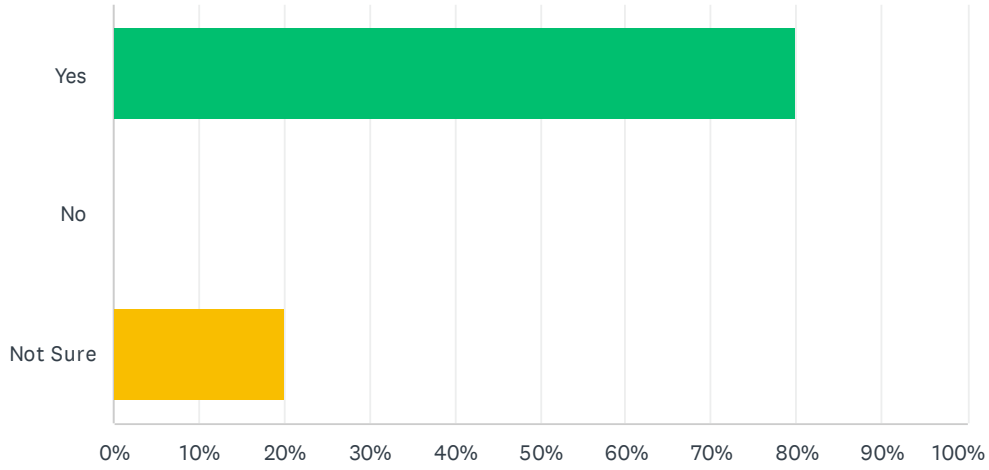
Answered: 5 Skipped: 5



ANSWER CHOICES	RESPONSES	
1	0.00%	0
2	20.00%	1
3	0.00%	0
4	80.00%	4
5	0.00%	0
TOTAL		5

Q5 Do you believe this publication will continue to fill a need over the next five years?

Answered: 5 Skipped: 5



ANSWER CHOICES	RESPONSES	
Yes	80.00%	4
No	0.00%	0
Not Sure	20.00%	1
TOTAL		5

Q6 What, if any, are areas of the publication that could be developed, made more clear, or made more accurate?

Answered: 3 Skipped: 7

#	RESPONSES	DATE
1	I would need to use it again to answer that as it has been a few years since I used it.	3/10/2023 3:20 PM
2	Simplify some of the concepts for those not familiar with LCCA.	3/10/2023 8:02 AM
3	Time spans less than 15 years should have the option to do a simpler cost-benefit analysis. The method for doing a CBA should live in this publication.	3/10/2023 7:51 AM

Q7 Are there other related topics you would like to see addressed in the publication?

Answered: 3 Skipped: 7

#	RESPONSES	DATE
1	I would need to use it again to answer that as it has been a few years since I used it.	3/10/2023 3:20 PM
2	How commissioning and retro-commissioning costs fit into LCCA.	3/10/2023 8:02 AM
3	TBD	3/10/2023 7:51 AM

Q8 If supplementary tools are provided, do they work well; are they presented in a useful format? (Current supplementary tools include an LCCA workbook)

Answered: 3 Skipped: 7

#	RESPONSES	DATE
1	Yes, format works	3/13/2023 9:59 AM
2	Yes, the LCCA workbook works just fine.	3/10/2023 3:20 PM
3	The tool is useful but may be difficult for some users to understand fully.	3/10/2023 8:02 AM

Q9 Are there additional tools the department could develop that would improve the aspects of capital project work addressed in this publication?

Answered: 2 Skipped: 8

#	RESPONSES	DATE
1	I would need to use it again to answer that as it has been a few years since I used it.	3/10/2023 3:20 PM
2	None that currently come to mind.	3/10/2023 8:02 AM

Life Cycle Cost Analysis Handbook

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Michael Morgan/Nathan Coffee (1st Edition)

Acknowledgements

Thanks to current staff of the Facilities section of DEED for their assistance in producing and editing this ~~2nd~~ 3rd Edition and to past staff for their assistance with the first edition.

Thanks also to the Bond Reimbursement and Grant Review Committee members who reviewed the publication in its final form.

Table of Contents

Introduction

For years, the architecture/engineering and construction industries have focused on two primary concerns in the creation of buildings. The first, which is of utmost importance to architects and engineers, is the design of a building. Is the building enjoyable to view and occupy? Does the organization of spaces enhance the user's program? The client expects ~~an architect to be able to design~~ a building design that satisfies their aesthetic and functional goals.

The second concern, which is the primary focus of contractors, is the construction of a building. How will the building be built? How much will the building cost? The client expects a ~~contractor to be able to construct a~~ sound building for the estimated construction cost.

These are typically the primary concerns of a client when the idea of constructing a building is addressed, so it is no surprise that architects and contractors focus their efforts ~~to~~ towards this end. ~~Granted, these~~These are significant concerns; however, they are not the only concerns that should be addressed when planning ~~for the~~ future construction.

A third concern that is receiving more attention as building owners investigate the economics of facility management~~,~~ is the cost of ~~building~~ operations over the life of a building or building system. The combination of economic theory and computer technology allows for a more sophisticated approach to the design and construction of a facility than ever before. Instead of merely looking at the facility in terms of cost to design and build, owners can broaden their perspective to include operations, maintenance, repair, replacement, and disposal costs. The sum of initial and future costs associated with the construction and operation of a building or building system over a designated period of time is called the life cycle cost ~~of a facility~~.

The *National Institute of Standards and Technology (NIST) Handbook 135, ~~1996~~ 2022 edition,* defines **Life Cycle Cost (LCC)** as "the total discounted dollar cost of owning, operating, maintaining, and disposing of a building or a building system" over a designated period of time. Life Cycle Cost Analysis (LCCA) is an economic evaluation technique that determines the total cost of owning and operating a facility or building system over a period of time.

Life Cycle Cost ~~Analysis~~ Analyses can be performed on ~~large and small~~any size of building~~s~~ or on ~~isolated~~ individual building systems. Many building owners apply the principles of life cycle cost analysis ~~in~~ when making decisions ~~they make~~ regarding construction or improvements to a facility. From the homeowner who opts for vinyl siding in lieu of wood to the federal highway commission that chooses concrete paving over asphalt, both owners ~~are~~ should be taking into consideration the future maintenance and replacement costs in their selections. While initial cost is a factor in their decisions, it is not the only factor.

The guidelines incorporated in this handbook have been developed to assist Alaskan school districts, their consultants, and communities in evaluating the life cycle cost of school construction decisions. The guidelines are based on AS 14.11.013, which directs the Department

of Education & Early Development (DEED) to review projects to ensure they are in the best interest of the state, and AS 14.11.014, which stipulates the development of criteria intended to achieve cost-effective school construction.

In response to these legislative directives, the department evaluates all school construction and major maintenance grant requests based on their initial and long-term costs, i.e., their life cycle cost. This handbook establishes the Life Cycle Cost Analysis technique and criteria by which educational facility construction alternatives are to be evaluated. It is important to note that the usefulness of an~~a~~ LCCA lies not in the determination of a total cost of a project alternative, but in the ability to compare the cost of project alternatives and to determine which alternative provides the best value per dollar spent.

In 2022 the department introduced the *Alaska School Design & Construction Standards*. These Standards achieve two primary objectives. They fulfill a statutory mandate to provide cost-effective construction standards and they establish consistency for state aid. The Standards apply to all new school construction and new additions to existing buildings. Renovation to existing facilities will adhere to the Standards, whenever possible, as approved by DEED.

Selected design features and materials described in Part 2 Design Principles and Part 3 System Standards, have been designated with indicators for an LCCA. The indicators are followed by a numerical scale of 1 through 5 that conform to the following levels:

Designation	Cost Savings
LCCA-1	0% to 2%
LCCA-2	2% to <5%
LCCA-3	5% to <8%
LCCA-4	8% to <12%
LCCA-5	12% to 15%

LCCA-1 has the least life cycle to cost benefit, LCCA-5 has the most benefit.

An LCCA is required to support certain designated elements in the Standards prior to approval by DEED for inclusion in a project. The cost savings are what is expected to be achieved in comparison to baseline options. The LCCA level is shown in the Standards where the element is described.

Terminology of Life Cycle Cost Analysis

Life Cycle Cost Analysis is an essential design process for controlling the initial and the future cost of building ownership. LCCA can be implemented prior to design efforts or at any ~~level of~~point in the design process. ~~and~~ It can also be an effective tool for evaluation of existing building systems. LCCA can be used to evaluate the total cost of a full range of projects, from an entire site complex to a specific building system component. The Department of Education & Early Development has been charged with the responsibility of determining if a school capital project is in the best interest of the State of Alaska. The effective use of LCCA is vital in demonstrating that a school district's project request is not only the best solution for the district ~~themselves~~, but also for the State of Alaska.

As defined earlier, Life Cycle Cost is the total discounted dollar cost of constructing, owning, operating, maintaining, and disposing of a building or a building system over a defined period of time. Keeping this definition in mind, one can breakdown the LCC equation into the following three variables: the pertinent **costs** of ownership, the period of **time** over which these costs are incurred, and the **discount rate** that is applied to future costs to equate them with present day costs.

Initial & Future Expenses

The first component in ~~a~~ an LCC equation is cost. There are two major cost categories by which projects are to be evaluated in ~~a~~ an LCCA. They are Initial Expenses and Future Expenses. **Initial Expenses** are all costs incurred prior to occupation of the facility. **Future Expenses** are all costs incurred after occupation of the facility. Appendix A outlines the individual costs that are to be evaluated within the two major cost categories.

Defining the exact costs of each expense category can be somewhat difficult since, at the time of the LCC study, nearly all costs are unknown. However, through the use of reasonable, consistent, and well-documented assumptions, a credible LCCA can be prepared.

~~One should also note~~It should also be noted that not all of the cost categories are relevant to all projects. The preparer is responsible for ~~the~~ inclusion of the pertinent cost categories that will produce a realistic LCC comparison of project alternatives. If costs in a particular cost category are equal in all project alternatives, they can be documented as such and removed from consideration in the LCC comparison.

Residual Value

One future expense that warrants further explanation is that of residual value. **Residual value** is the net worth of a building at the end of the LCCA study period. Unlike other future expenses, an alternative's residual value can be positive or negative, a cost or a value.

Since ~~a~~ an LCC is a summation of costs, a negative residual value indicates that there is value associated with the building at the end of the study period. Perhaps~~,~~ the value is a roof that was recently ~~replaced~~replaced, or it is the building's superstructure that could function for another thirty years. Whatever the reason for the remaining value, it is a tangible asset of building ownership and should be included in the LCCA.

A positive residual value indicates that there are disposal costs associated with the building at the end of the study period. Perhaps, the costs are related to abatement of hazardous material or demolition of the structure. Whatever the cause, these are the costs of building ownership and should be included in the LCCA.

Zero residual value indicates that there is no value or cost associated with the building at the end of the study period. This rare instance occurs if the intended use of the building terminates concurrent ~~to~~ with the end of the study period, the owner is unable to sell the building, and the owner is able to abandon the building at no expense.

Study Period

The second component of the LCC equation is time. The **study period** is the period of time over which ownership and operational~~s~~ expenses are to be evaluated. Typically, the study period can range from twenty to forty years, depending on owner's preferences, the stability of the user's program, and the intended overall life of the facility. While the length of the study period is often a reflection of the intended life of a facility, the study period is usually shorter than the intended life of the facility.

The National Institute of Standards and Technology (NIST) breaks the study period into two phases: the planning/construction period and the service period. The planning/construction period is the time period from the start of the study to the date the building becomes operational (the service date). The service period is the time period from the date the building becomes operational to the end of the study.

Due to the uncertainty of construction funding and the short construction season, the planning/construction period can take several years to complete for an Alaskan school project. To remove the uncertainty regarding the appropriate length of the planning/construction period and to simplify the LCC calculation, the department approves of the assumption that all initial costs will be incurred in the base year of the study. Thus, all initial costs will be entered into the LCCA at their full value.

The DEED recommended study period for LCCA is twenty years. This is due to population fluctuations within communities, the ever-changing nature of educational programs, the relative life span of individual building systems, and the reduced economic impact of costs incurred after twenty years.

The department's LCCA sSpreadsheet is designed for a twenty--year study period. It can be used to evaluate project options for complete school facilities (new construction and renovation projects), as well as evaluate project options related to individual building systems (roof replacement projects, mechanical upgrade projects, etc.).

Real Discount Rate

The third component in the LCC equation is the discount rate. The **discount rate**, as defined by *Life Cycle Costing for Design Professionals, 2nd Edition*, is "the rate of interest reflecting the investor's time value of money." Basically, it is the interest rate that would make an investor indifferent as to whether he received a payment now or a greater payment at some time in the future.

The NIST takes the definition of discount rates a step further by separating them into two types: real discount rates and nominal discount rates. The difference between the two is that the **real discount rate** *excludes* the rate of inflation, and the **nominal discount rate** *includes* the rate of inflation. This is not to say that real discount rates ignore inflation, their use simply eliminates the complexity of accounting for inflation within the present value equation. The use of either discount rate in its corresponding present value calculation derives the same result. For simplicity, this handbook will focus on the use of real discount rates in the calculation of LCC for project alternatives.

Obviously, as the economics of the world around us changes, so to does the discount rate. To establish a standard discount rate to be used in LCCA, the department has adopted the U.S. Department of Energy's real discount rate. This rate is updated and published annually in the *Energy Price Indices and Discount Factors for Life-Cycle Cost Analysis – Annual Supplement to NIST Handbook 135*. The publication can be found at https://www.nist.gov/publications/

Constant-Dollars

Just as discount rates can be defined as either real or nominal, so too can costs. The *NIST Handbook 135, 1995 2022 edition*, defines **constant-dollars** as "dollars of uniform purchasing power tied to a reference year and exclusive of general price inflation or deflation." The NIST defines **current-dollars** as "dollars of nonuniform purchasing power, including general price inflation or deflation, in which actual prices are stated."

When using the real discount rate in present value calculations, costs must be expressed in constant-dollars. Similarly Likewise, when using the nominal discount rate in present value calculations, costs must be expressed in current-dollars. In the rare case that the inflation rate is zero, constant-dollars are equal to current-dollars and the real discount rate is equal to the nominal discount rate.

In practice, the use of constant-dollars simplifies LCCA. For example, suppose one wants to evaluate roofing products over a 30-year period. However, one roofing product must be replaced after 20 years. How much will the replacement of the roof cost in 20 years? By using constant dollars, the guesswork of estimating the escalation of labor and material costs is eliminated. The future constant dollar cost (excluding demolition) to install a new roof in 20 years is the same as the initial cost to install the roof. Any change in the value of money over time will be accounted for by the real discount rate.

Present Value

To accurately combine initial expenses with future expenses, the present value of all expenses must first be determined. The *NIST Handbook 135, ~~1995~~ 2022 edition*, defines **present value** as "the time-equivalent value of past, present or future cash flows as of the beginning of the base year."

The present value calculation uses the discount rate and the time a cost was or will be incurred to establish the present value of the cost in the base year of the study period. Since most initial expenses occur at about the same time, initial expenses are considered to occur during the base year of the study period. Thus, there is no need to calculate the present value of these initial expenses because their present value is equal to their actual cost.

The determination of the present value of future costs is time dependent. The time period is the difference between the time of initial costs and the time of future costs. Initial costs are incurred at the beginning of the study period ~~at~~in Year 0, the base year. Future costs can be incurred anytime between Year 1 and ~~Year 20~~the final year of the study period. The present value calculation is the equalizer that allows the summation of initial and future costs.

Along with time, the discount rate also dictates the present value of future costs. Because the current discount rate is a positive value (inflation), future expenses will have a present value less than their cost at the time they are incurred.

Future costs can be broken down into two categories: one-time costs and recurring costs. **Recurring costs** are costs that occur every year over the span of the study period. Most operating and maintenance costs are recurring costs. **One-time costs** are costs that do not occur every year over the span of the study period. Most replacement costs are one-time costs.

To simplify the LCCA, all recurring costs are expressed as annual expenses incurred at the end of each year and one-time costs are incurred at the end of the year in which they occur. To determine the present value of future one-time costs the following formula is used:

$$PV = A_t \times \frac{1}{(1+d)^t}$$

Where:

PV = Present Value

A_t = Amount of one-time cost at a time "t"
d = Real Discount Rate
t = Time (expressed as number of years)

To determine the present value of future recurring costs the following formula is used:

$$PV = A_0 \times \frac{(1+d)^t - 1}{d \times (1+d)^t}$$

Where:
PV = Present Value
A_0 = Amount of recurring cost
d = Real Discount Rate
t = Time (expressed as number of years)

Selection of Project Alternatives

Prior to beginning an LCCA, project alternatives need to be established. These alternatives should be distinctly different and viable solutions to the facility issue being addressed. The chosen alternative is to be the most reasonable and cost-effective solution to the project problem. A minimum of three different project alternatives should be incorporated into the LCCA. A brief description of each project alternative and why it was chosen should be included in the LCCA.

Listed below are some possible project options that should be considered while selecting the most viable, reasonable, and cost-effective alternatives. These options are based on statutory language found in AS 14.11 and are included in the instructions to the annual CIP grant applications.

- Renovation and addition to the existing school facility.
- Rental and remodel of an existing local facility.
- Purchase and remodel of an existing local facility.
- Alteration of the attendance area boundary.
- Demolition of existing school and construction of a new school on the same site.
- The use of double shifting or year round school.
- Sale of existing school and construction of a new school on a new site.

Renovation and addition to the existing facility must be considered as at least one of the project alternatives for replacement school projects. A "No Action" alternative is not an acceptable project alternative. Options for the replacement of a building system could include replacement of select items, refurbishment, phasing the replacement in sections or different materials or equipment type.

An LCCA for each of the selected project alternatives is to be generated using the DEED~~'s~~ LCCA spreadsheet or other software. The department's spreadsheet is available online at: https://education.alaska.gov/facilities/publications

Completion of the Life Cycle Cost Analysis

A LCCA can be performed in a variety of ways without compromising the results if the assumptions that shape the LCCA employ reasonable and consistent judgement. Given the various methods used to perform an LCCA, the Department of Education & Early Development has outlined the basic steps for preparation of an LCCA below.

This is not intended to be the only way an LCCA should be prepared, but it is meant to clarify the department's expectations. This outline should also enable school districts to judge for themselves the quality of services provided by their consultants.

The LCCA needs only to address cost categories that are pertinent to the scope of the project. However, to insure accurate comparison of alternatives, all LCCA evaluations of the project alternatives must incorporate the same cost categories. The LCCA of each project alternative should include:

- A brief description of the project alternative.
- A brief explanation as to why the project alternative was selected.
- A brief explanation of the assumptions made during the LCCA.
- Conceptual or schematic documentation indicating the design intent of the alternative.
- A site plan showing the integration of the proposed facility on the site and necessary site improvements (for projects involving additions or new construction).
- A detailed LCCA of the project alternative.
- A summary table that compares the total life cycle costs of Initial Investment, Operations, Maintenance & Repair, Replacement, and Residual Value of all the project alternatives.

Initial Investment Costs

The first step in the completion of the LCCA of a project alternative is to define all the initial investment costs of the alternative. **Initial investment costs** are costs that will be incurred prior to the occupation of the facility. All initial costs are to be added to the LCCA total at their full value. Appendix A lists the minimum initial investment cost categories that are to be addressed.

The level of detail of these costs should be commensurate with the level of project detail. Construction costs can be derived by using the DEED~~'s~~ Cost Model spreadsheet, construction cost literature, contractor quotes, or professional cost estimating consultants.

Operation Costs

The second step in the completion of the LCCA of a project alternative is to define all the future operation costs of the alternative. The **operation costs** are annual costs, excluding maintenance and repair costs, involved in the operation of the facility. Most of these costs are related to building utilities and custodial services. All operation costs are to be discounted to their present value prior to addition to the LCCA total. Appendix A lists the minimum operation cost categories that are to be addressed in the LCCA.

Operation costs that are not directly related to the building should usually be excluded from the LCCA. An example of a cost that should be excluded is the cost of office materials. While it is an annual operating expense, it has nothing to do with the operation of the building but is ~~rather~~ instead a function of the building user.

However, should project alternatives generate different requirements of the user, it is appropriate to include these costs. An example of such a situation is the comparison of a year round school alternative with an alternative that uses the traditional nine month school season. It is quite possible that the two alternatives would have different staffing requirements. While staffing is ~~hardly~~ not a building operation cost, it should be included in the LCCA to provide an accurate comparison of the alternatives.

Maintenance & Repair Costs

The third step in the completion of the LCCA of a project alternative is to define all the future maintenance and repair costs of the alternative. For simplicity, maintenance and repair costs have been combined in the department's LCCA spreadsheet. It should be noted that there is a distinct difference between the two costs.

Maintenance costs are scheduled costs associated with the upkeep of the facility. An example of a maintenance cost is the cost of an annual roof inspection and caulking of the building's roof penetrations. This task is a scheduled event that is intended to keep the building in good condition.

Repair costs are unanticipated expenditures that are required to prolong the life of a building system without replacing the system. An example is the repair of a broken window. This is an unscheduled event that does not entail replacement of the entire window unit, merely the replacement of the broken pane.

Some maintenance costs are incurred annually and others less frequently. Repair costs are, by definition, unforeseen so it is impossible to predict when they will occur. For simplicity, maintenance and repair costs should be treated as annual costs. All maintenance and repair costs are to be discounted to their present value prior to addition to the LCCA total. Appendix A lists the minimum maintenance and repair cost categories that are to be addressed in the LCCA.

It is important to note that all options are not 'created equal'. At first glance, maintenance and repair costs could be judged to be equal for all alternatives. However, the department urges districts to delve deeper and ask, "Is it possible that an alternative is more susceptible to damage than others?" Facility location, age of building systems, and variations in exterior envelope area are just a few factors that should be considered when estimating maintenance and repair costs for project alternatives. Credible explanation of the district's evaluation assumptions should be included in the LCCA.

Due to the variation in the Alaskan climate and building conditions, the department recommends using actual historical data and the district's preventative maintenance plan to generate maintenance and repair costs. Since maintenance and repair costs are typically part of the school's operating budget, historical costs for this work should be available. When actual maintenance costs are unavailable, costs can be derived from use of available literature or cost estimating consultants.

Replacement Costs

The fourth step in the completion of the LCCA of a project alternative is to define all the future replacement costs of the alternative. **Replacement costs** are anticipated expenditures to major building system components that are required to maintain the operation of a facility. All replacement costs are to be discounted to their present value prior to addition to the LCCA total. Appendix A lists the minimum replacement cost categories that are to be addressed in the LCCA.

Replacement costs are typically generated by replacement of a building system or component that has reached the end of its useful life. An example of a replacement cost is the replacement of a boiler. A boiler has a life expectancy that is shorter than that of the facility it serves. At some point it will fail and require replacement to keep the facility operational.

Since this handbook assumes the use of the constant-dollar approach to LCCA, the cost to replace a building component in the future will be the same as the current cost of the building component plus demolition costs and any alterations of existing systems required for the new component(s). Replacement costs can be derived from use of the DEED~~'s~~ Cost Model spreadsheet, construction cost literature, contractor quotes, historical data, or cost estimating consultants.

Residual Value

The fifth step in the completion of the LCCA of a project alternative is to define the residual value of the alternative. **Residual value**, as defined earlier, is the net worth of a building or building system at the end of the LCCA study period. This is the only cost category in an LCCA where a negative value, one that reduces cost, is acceptable.

Completion of the Life Cycle Cost Analysis

The residual value of a facility or building system is especially important when evaluating project alternatives that have different life expectancies. An example is the evaluation of two roofing alternatives, a metal roof ~~and~~ versus a composition shingle roof.

The shingle roof has a life span of 20 years whereas the metal roof is expected to last 40 years. In an LCCA over a 30-year study period the shingle roof will have to be replaced, thus incurring replacement costs. The metal roof will not require replacement; thus, no replacement costs will be incurred. The residual value of each option is to be calculated as follows:

Metal Roof Residual Value = (Initial Cost) x (Age of Metal Roof/Metal Roof Life - 1)

Shingle Roof Residual Value = (Initial Cost) x (Age of Shingle Roof/Shingle Roof Life - 1)

The metal roof has a residual value of one quarter its initial cost because at the end of the study period three-quarters of its intended life will have been consumed. The shingle roof has a residual value of half its initial cost because a replacement roof was installed ten years prior. Thus, at the end of the study period, half of the *current* shingle roof's intended life will have been consumed.

The residual value of a project alternative can be established in several different ways depending on the level of detail available. However, project solutions that opt for a new replacement facility in lieu of renovation and addition to the existing facility should establish residual value on a building systems basis.

Finalize LCCA

Once all pertinent costs have been established and discounted to their present value, the costs can be summed to generate the total life cycle cost of the project alternative. After this has been done for all the viable project alternatives, a summary of the results should be prepared. The summary of project alternatives should compare the total life cycle costs of Initial Investment, Operations, Maintenance & Repair, Replacement, and Residual Value of all the project alternatives.

It is anticipated that the project alternative with the lowest overall life cycle cost will be the project alternative presented in the school district's Capital Improvement Project (CIP) request.

Summary

This handbook was created to assist school districts and consultants in the Life Cycle Cost Analysis of proposed educational facility construction projects. The Department of Education & Early Development is responsible for ensuring that funded projects are in the best interest of the State of Alaska and are cost-effective solutions. The submittal of realistic LCCAs assists in such a determination.

Unfortunately, not all grant applications have convinced the department that the proposed project was the best and most cost-effective solution. Problems encountered with LCCAs have ranged from faulty methodology to the use of "straw man" alternatives. To assist school districts in avoiding the problems that have surfaced in previous LCCAs, the following list of suggestions is provided:

- Evaluate all project alternatives by the same cost categories, over the same study period, using the same discount rate.
- Include only cost categories that are pertinent to the project scope. If one project alternative incurs costs in a specific cost category, that cost category must be included in all other project alternatives even if no costs are incurred.
- Use the constant-dollar approach to LCCA. This is especially important when defining Replacement Costs.
- Include demolition costs of a building component or system when calculating its Replacement Cost.
- Project alternatives that surplus buildings to the State of Alaska are required to include the cost of demolition in their LCCA.
- Project alternatives that surplus buildings to the local community are required to include the cost of hazardous material abatement in their LCCA.
- Define at least three viable project alternatives for further study. The selected alternatives should be distinctly different to cover the spectrum of possible options. A "No Action" alternative is not considered a viable project alternative.
- All project alternatives must be viable options (i.e., no "straw man" alternatives).
- Address why a project alternative is in the best interest of the State of Alaska.

Closing

The guidelines incorporated in this handbook are intended to assist Alaska school districts with the evaluation of various educational facility project alternatives using LCCA. The process of performing an LCCA will heighten understanding of the proposed project among designers and district representatives. Often, cost saving ideas are generated that can be applied to more than one alternative. These ideas can direct the final design of a project toward cost-effective construction and enhance the overall value of a project.

The use of LCCA enables projects to be evaluated by their long-term costs rather than just their initial construction cost. This requires facility owners to consider the long-term operations and maintenance costs of a facility design. The emphasis on future facility costs directly benefits school districts. A building design that minimizes future operations and maintenance expenses leaves more money in the school district's operating budget, thus making more funds available for the education of the students.

LCCA is also a means of supporting certain elements of a design in relation to the *Alaska School Design & Construction Standards*. A design that aspires to utilize certain designated elements must employ LCCA to demonstrate that the option provides for cost effective design.

The Department of Education & Early Development believes the implementation of proper LCCA techniques will promote cost-effective design and construction practices. The long-term savings generated by these efforts will benefit students, teachers, school districts, as well as the State of Alaska.

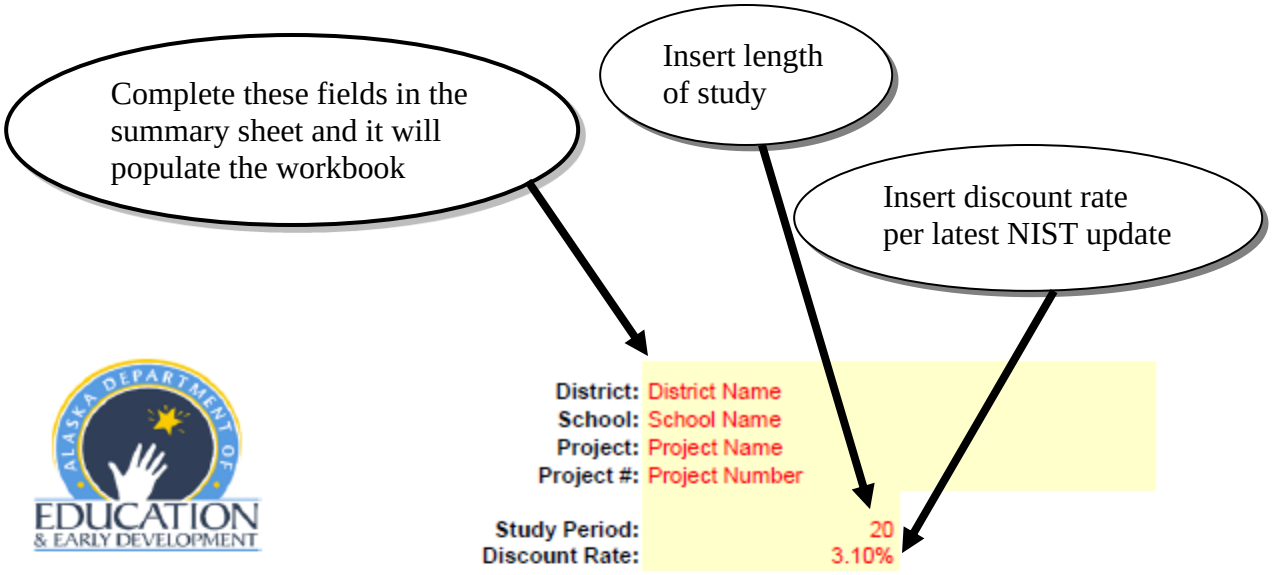
Samples

Life Cycle Cost Analysis Sample

And

Instructions

Samples



Life Cycle Costs of Project Alternatives

	Alternate #1	Alternate #2	Alternate #3
Initial Investment Cost	$0	$0	$0
Operations Cost	$0	$0	$0
Maintenance & Repair Cost	$0	$0	$0
Replacement Cost	$0	$0	$0
Residual Value	$0	$0	$0
Total Life Cycle Cost	**$0**	**$0**	**$0**
GSF of Project	1 GSF	1 GSF	1 GSF
Initial Cost/GSF	$0.00	$0.00	$0.00
LCC/GSF	$0.00	$0.00	$0.00

The summary will auto-fill from the Alternate 1, 2 and 3 worksheets

Samples

District: District Name
School: School Name
Project: Project Name
Project #: Project Number
GSF: 1 GSF

	Quantity	Unit	Unit Cost	Total Cost	Years	Present Value
Initial Expenses						
Initial Investment Cost (one time start-up costs)						
Construction Management	1	LPSM	$0	$0	0	$0
Land Acquisition	1	LPSM	$0	$0	0	$0
Site Investigation	1	LPSM	$0	$0	0	$0
Design Services	1	LPSM	$0	$0	0	$0
Construction	1	LPSM	$0	$0	0	$0
Equipment	1	LPSM	$0	$0	0	$0
Technology	1	LPSM	$0	$0	0	$0
Indirect/Administration	1	LPSM	$0	$0	0	$0
Art	1	LPSM	$0	$0	0	$0
Contingency	1	LPSM	$0	$0	0	$0
Future Expenses						
Operations Cost (annual costs)						
Heating Fuel	1	GALS	$0.00	$0	20	$0
Electricity	1	KWH	$0.00	$0	20	$0
Water and Sewer	1	LPSM	$0	$0	20	$0
Garbage Disposal	1	LPSM	$0	$0	20	$0
Custodial	1	LPSM	$0	$0	20	$0
Grounds	1	LPSM	$0	$0	20	$0
Lease	1	LPSM	$0	$0	20	$0
Insurance	1	LPSM	$0	$0	20	$0
Other	1	LPSM	$0	$0	20	$0
Maintenance & Repair Cost (upkeep costs ... estimate on annual basis)						
Site Improvements	1	LPSM	$0	$0	20	$0
Site Utilities	1	LPSM	$0	$0	20	$0
Foundation/Substructure	1	GSF	$0.00	$0	20	$0
Superstructure	1	GSF	$0.00	$0	20	$0
Exterior Wall Systems	1	EWSF	$0.00	$0	20	$0
Exterior Windows	1	GLSF	$0.00	$0	20	$0
Exterior Doors	1	LEAF	$0.00	$0	20	$0
Roof Systems	1	RFSF	$0.00	$0	20	$0
Interior Partitions	1	PTSF	$0.00	$0	20	$0
Interior Doors	1	LEAF	$0.00	$0	20	$0
Interior Floor Finishes	1	FFSF	$0.00	$0	20	$0
Interior Wall Finishes	1	WFSF	$0.00	$0	20	$0
Interior Ceiling Finishes	1	CFSF	$0.00	$0	20	$0
Interior Specialities	1	GSF	$0.00	$0	20	$0
Conveying Systems	1	LPSM	$0	$0	20	$0
Plumbing Piping	1	GSF	$0.00	$0	20	$0
Plumbing Fixtures	1	FIXT	$0.00	$0	20	$0
Fire Protection Systems	1	GSF	$0.00	$0	20	$0

Samples

District: District Name
School: School Name
Project: Project Name
Project #: Project Number
GSF: 1 GSF

	Quantity	Unit	Unit Cost	Total Cost	Years	Present Value
HVAC Distribution	1	GSF	$0.00	$0	20	$0
HVAC Equipment	1	LPSM	$0	$0	20	$0
HVAC Controls	1	GSF	$0.00	$0	20	$0
Special Mechanical Systems	1	GSF	$0.00	$0	20	$0
Electrical Service/Generation	1	LPSM	$0	$0	20	$0
Electrical Distribution	1	GSF	$0.00	$0	20	$0
Electrical Lighting	1	GSF	$0.00	$0	20	$0
Special Electrical Systems	1	GSF	$0.00	$0	20	$0
Equipment & Furnishings	1	LPSM	$0	$0	20	$0
Other	1	LPSM	$0	$0	20	$0
Other	1	LPSM	$0	$0	20	$0
Replacement Cost (scheduled replacement of building system or component)						
Site Improvements	1	LPSM	$0	$0	1	$0
Site Utilities	1	LPSM	$0	$0	1	$0
Foundation/Substructure	1	GSF	$0.00	$0	1	$0
Superstructure	1	GSF	$0.00	$0	1	$0
Exterior Wall Systems	1	EWSF	$0.00	$0	1	$0
Exterior Windows	1	GLSF	$0.00	$0	1	$0
Exterior Doors	1	LEAF	$0.00	$0	1	$0
Roof Systems	1	RFSF	$0.00	$0	1	$0
Interior Partitions	1	PTSF	$0.00	$0	1	$0
Interior Doors	1	LEAF	$0.00	$0	1	$0
Interior Floor Finishes	1	FFSF	$0.00	$0	1	$0
Interior Wall Finishes	1	WFSF	$0.00	$0	1	$0
Interior Ceiling Finishes	1	CFSF	$0.00	$0	1	$0
Interior Specialities	1	GSF	$0.00	$0	1	$0
Conveying Systems	1	LPSM	$0	$0	1	$0
Plumbing Piping	1	GSF	$0.00	$0	1	$0
Plumbing Fixtures	1	FIXT	$0.00	$0	1	$0
Fire Protection Systems	1	GSF	$0.00	$0	1	$0
HVAC Distribution	1	GSF	$0.00	$0	1	$0
HVAC Equipment	1	LPSM	$0	$0	1	$0
HVAC Controls	1	GSF	$0.00	$0	1	$0
Special Mechanical Systems	1	GSF	$0.00	$0	1	$0
Electrical Service/Generation	1	LPSM	$0	$0	1	$0
Electrical Distribution	1	GSF	$0.00	$0	1	$0
Electrical Lighting	1	GSF	$0.00	$0	1	$0
Special Electrical Systems	1	GSF	$0.00	$0	1	$0
Equipment & Furnishings	1	LPSM	$0	$0	1	$0
Other	1	LPSM	$0	$0	1	$0
Other	1	LPSM	$0	$0	1	$0
Residual Value (value of facility at end of study period)						
Site Improvements	1	LPSM	$0	$0	1	$0
Site Utilities	1	LPSM	$0	$0	1	$0
Foundation/Substructure	1	GSF	$0.00	$0	1	$0
Superstructure	1	GSF	$0.00	$0	1	$0

Samples

District:	District Name
School:	School Name
Project:	Project Name
Project #:	Project Number
GSF:	1 GSF

	Quantity	Unit	Unit Cost	Total Cost	Years	Present Value
Exterior Wall Systems	1	EWSF	$0.00	$0	1	$0
Exterior Windows	1	GLSF	$0.00	$0	1	$0
Exterior Doors	1	LEAF	$0.00	$0	1	$0
Roof Systems	1	RFSF	$0.00	$0	1	$0
Interior Partitions	1	PTSF	$0.00	$0	1	$0
Interior Doors	1	LEAF	$0.00	$0	1	$0
Interior Floor Finishes	1	FFSF	$0.00	$0	1	$0
Interior Wall Finishes	1	WFSF	$0.00	$0	1	$0
Interior Ceiling Finishes	1	CFSF	$0.00	$0	1	$0
Interior Specialities	1	GSF	$0.00	$0	1	$0
Conveying Systems	1	LPSM	$0	$0	1	$0
Plumbing Piping	1	GSF	$0.00	$0	1	$0
Plumbing Fixtures	1	FIXT	$0.00	$0	1	$0
Fire Protection Systems	1	GSF	$0.00	$0	1	$0
HVAC Distribution	1	GSF	$0.00	$0	1	$0
HVAC Equipment	1	LPSM	$0	$0	1	$0
HVAC Controls	1	GSF	$0.00	$0	1	$0
Special Mechanical Systems	1	GSF	$0.00	$0	1	$0
Electrical Service/Generation	1	LPSM	$0	$0	1	$0
Electrical Distribution	1	GSF	$0.00	$0	1	$0
Electrical Lighting	1	GSF	$0.00	$0	1	$0
Special Electrical Systems	1	GSF	$0.00	$0	1	$0
Equipment & Furnishings	1	LPSM	$0	$0	1	$0
Other	1	LPSM	$0	$0	1	$0
Other	1	LPSM	$0	$0	1	$0

Total Life Cycle of Alternate #1 **$0**

Life Cycle Cost Analysis – Example

(un-used rows hidden)

Samples

LCCA Task

Compare life-cycle costs for three roof insulation R-values to determine the most cost-effective solution over a 40–year life.

Project Assumptions

- Project Location: Fairbanks
- Roof Area: 10,000 SF

	Alternate 1	Alternate 2	Alternate 3
Description	R-40 insulation under 30 yr. EPDM	R-60 insulation under 30 yr. EPDM	R-80 insulation under 30 yr. EPDM
Initial Investment Costs	Cost of insulation and roof from contractor estimate, heating system base -55F design temp $165,700	Cost of insulation and roof from estimate less heating system demand reduction (-10,417btu) $178,600-$7,500	Cost of insulation and roof from estimate less heating system demand reduction (-15,625 btu) $194,800-$14,350
Energy Costs (Operational)	Energy modeling using 13,500 hdd and 75% AFUE for oil fired boiler. 818 gal/yr.	Energy modeling using 13,500 hdd and 75% AFUE for oil fired boiler 545 gal/yr.	Energy modeling using 13,500 hdd and 75% AFUE for oil fired boiler 409 gal/yr.
Maintenance and Repair	Same for all alternates	Same for all alternates	Same for all alternates
Replacement Costs	EPDM at 30 years Insulation - 50 years	EPDM at 30 years Insulation - 50 years	EPDM at 30 years Insulation - 50 years
Discount Rate NIST 2016	3%	3%	3%

Samples

District: ABC School District
School: ZYX Elementary
Project: New School (Roof Insulation Options)
Project #: DR-xx-1xx

Study Period: 40
Discount Rate: 3.00%

Life Cycle Costs of Project Alternatives

	Alternate #1	Alternate #2	Alternate #3
Initial Investment Cost	**$165,700**	**$171,100**	**$180,450**
Operations Cost	**$56,724**	**$37,793**	**$28,362**
Maintenance & Repair Cost	**$0**	**$0**	**$0**
Replacement Cost	**$18,951**	**$18,951**	**$18,951**
Residual Value	**-$13,080**	**-$13,693**	**-$14,919**
Total Life Cycle Cost	**$228,295**	**$214,151**	**$212,844**
GSF of Project	10,000 GSF	10,000 GSF	10,000 GSF
Initial Cost/GSF	$16.57	$17.11	$18.05
LCC/GSF	$22.83	$21.42	$21.28

Samples

District: ABC School District
School: ZYX Elementary
Project: New School (Roof Insulation Options)
Project #: DR-xx-1xx
GSF: 10,000 GSF

	Quantity	Unit	Unit Cost	Total Cost	Years	Present Value
Initial Expenses						
Initial Investment Cost (one time start-up costs)						
Construction	1	LPSM	$165,700	$165,700	0	$165,700
Future Expenses						
Operations Cost (annual costs)						
Heating Fuel	818	GALS	$3.00	$2,454	40	$56,724
Maintenance & Repair Cost (upkeep costs…estimate on annual basis)						
Replacement Cost (scheduled replacement of building system or component)						
Roof Systems	10,000	RFSF	$4.60	$46,000	30	$18,951
Roof Insulation	10,000	RFSF	$6	$60,000	50	$0
Residual Value (value of facility at end of study period)						
Roof Systems	10,000	RFSF	$4.60	$46,000	30	-$9,401
Roof Insulation	10,000	RFSF	$6	$60,000	50	-$3,679
Total Life Cycle of Alternate #1						**$228,295**

Samples

District: ABC School District
School: ZYX Elementary
Project: New School (Roof Insulation Options)
Project #: DR-xx-1xx
GSF: 10,000 GSF

	Quantity	Unit	Unit Cost	Total Cost	Years	Present Value
Initial Expenses						
Initial Investment Cost (one time start-up costs)						
Construction	1	LPSM	$171,100	$171,100	0	$171,100
Future Expenses						
Operations Cost (annual costs)						
Heating Fuel	545	GALS	$3.00	$1,635	40	$37,793
Maintenance & Repair Cost (upkeep costs…estimate on annual basis)						
Replacement Cost (scheduled replacement of building system or component)						
Roof Systems	10,000	RFSF	$4.60	$46,000	30	$18,951
Roof Insulation	10,000	RFSF	$7	$70,000	50	$0
Residual Value (value of facility at end of study period)						
Roof Systems	10,000	RFSF	$4.60	$46,000	30	-$9,401
Roof Insulation	10,000	RFSF	$7	$70,000	50	-$4,292
Total Life Cycle of Alternate #2						**$214,151**

Samples

District: ABC School District
School: ZYX Elementary
Project: New School (Roof Insulation Options)
Project #: DR-xx-1xx
GSF: 10,000 GSF

	Quantity	Unit	Unit Cost	Total Cost	Years	Present Value
Initial Expenses						
Initial Investment Cost (one time start-up costs)						
Construction	1	LPSM	$180,450	$180,450	0	$180,450
Future Expenses						
Operations Cost (annual costs)						
Heating Fuel	409	GALS	$3.00	$1,227	40	$28,362
Maintenance & Repair Cost (upkeep costs…estimate on annual basis)						
Replacement Cost (scheduled replacement of building system or component)						
Roof Systems	10,000	RFSF	$4.60	$46,000	30	$18,951
Roof Insulation	10,000	RFSF	$9	$90,000	50	$0
Residual Value (value of facility at end of study period)						
Roof Systems	10,000	RFSF	$4.60	$46,000	30	-$9,401
Roof Insulation	10,000	RFSF	$9	$90,000	50	-$5,518
Total Life Cycle of Alternate #3						**$212,844**

Appendices

Appendix A – Life Cycle Cost Categories

Initial Expenses

Initial Investment Cost (one time start-up costs)
- Construction Management
- Land Acquisition
- Site Investigation
- Design Services
- Commissioning
- Construction
- Equipment
- Technology
- Indirect/Administration
- Art
- Contingency

Future Expenses

Operation Cost (annual costs)
- Heating Fuel
- Electricity
- Water and Sewer
- Garbage Disposal
- Custodial
- Grounds
- Lease
- Insurance

Maintenance and Repair Cost (scheduled & unscheduled upkeep costs)
- Site Improvements
- Site Utilities
- Foundation/Substructure
- Superstructure
- Exterior Wall Systems
- Exterior Windows
- Exterior Doors
- Roof Systems
- Interior Partitions
- Interior Doors
- Interior Floor Finishes
- Interior Wall Finishes
- Interior Ceiling Finishes
- Interior Specialties

Appendix A – Life Cycle Cost Categories

Maintenance and Repair Cost (cont.)

Conveyance Systems
Plumbing Piping
Plumbing Fixtures
Fire Protection Systems
HVAC Distribution
HVAC Equipment
HVAC Controls
Special Mechanical Systems
Electrical Service/Generation
Electrical Distribution
Electrical Lighting
Special Electrical Systems
Equipment & Furnishings
Re-commissioning
Special Construction

Replacement Cost (scheduled replacement of building systems or components)

Site Improvements
Site Utilities
Foundation/Substructure
Superstructure
Exterior Wall Systems
Exterior Windows
Exterior Doors
Roof Systems
Interior Partitions
Interior Doors
Interior Floor Finishes
Interior Wall Finishes
Interior Ceiling Finishes
Interior Specialties
Conveyance Systems
Plumbing Piping
Plumbing Fixtures
Fire Protection Systems
HVAC Distribution
HVAC Equipment
HVAC Controls
Special Mechanical Systems
Electrical Service/Generation
Electrical Distribution
Electrical Lighting
Special Electrical Systems
Equipment & Furnishings
Special Construction

Appendix A – Life Cycle Cost Categories

Residual Value (value of facility at end of study period)

- Site Improvements
- Site Utilities
- Foundation/Substructure
- Superstructure
- Exterior Wall Systems
- Exterior Windows
- Exterior Doors
- Roof Systems
- Interior Partitions
- Interior Doors
- Interior Floor Finishes
- Interior Wall Finishes
- Interior Ceiling Finishes
- Interior Specialties
- Conveyance Systems
- Plumbing Piping
- Plumbing Fixtures
- Fire Protection Systems
- HVAC Distribution
- HVAC Equipment
- HVAC Controls
- Special Mechanical Systems
- Electrical Service/Generation
- Electrical Distribution
- Electrical Lighting
- Special Electrical Systems
- Equipment & Furnishings
- Special Construction

Appendix B – Quantity Abbreviations

CFSF – Ceiling Finish Square Feet: sum of all interior areas that receive a ceiling finish.

EWSF – Exterior Wall Square Feet: sum of all exterior wall surfaces excluding windows and doors but including exterior soffits.

FIXT – Plumbing Fixtures: sum of all plumbing fixtures that are connected to both supply and waste piping.

FFSF – Floor Finish Square Feet: sum of all interior areas that receive a floor finish.

GALS – Gallons: sum of annual fuel consumed for heating and electrical generation.

GLSF – Glazing Square Feet: square feet of exterior windows.

GSF – Gross Square Feet: sum of the building's interior spaces including wall area and mechanical mezzanines.

KWH – Kilowatt Hour: sum of annual electricity usage.

LPSM – Lump Sum: estimated financial allowance for a work item.

LEAF – Door ~~Leafs~~Leaf: sum of the number of door ~~leafs~~leaves. Double doors count as two ~~leafs~~leaves ~~where as~~whereas single doors count as one leaf.

PTSF – Partition Square Feet: square feet of interior partitions. Exclude all exterior walls and count only one face of the partition.

RFSF – Roof Square Feet: square feet of roof surface.

WFSF – Wall Finish Square Feet: sum of all interior areas that receive a wall finish, including interior face of exterior walls.

Glossary

Constant-Dollars: D~~d~~ollars that have uniform purchasing power over time and that are not affected by general price inflation or deflation.

Current-Dollars: D~~d~~ollars that do not have uniform purchasing power over time and that are affected by general price inflation or deflation.

Discount Rate: T~~t~~he rate of interest that balances an investor's time value of money.

Initial Investment Cost: A~~a~~ny cost of creation of a facility prior to its occupation.

Life Cycle Cost: A~~a~~ sum of all costs of creation ~~and~~, operation, and disposal of a facility over a period of time.

Life Cycle Cost Analysis: ~~a~~A technique used to evaluate the economic consequences over a period of time of mutually exclusive project alternatives.

Maintenance Cost: A~~a~~ny cost of scheduled upkeep of a building, building system, or building component.

Nominal Discount Rate: A~~a~~ discount rate that includes the rate of inflation.

Operating Cost: A~~a~~ny cost of the daily function of a facility.

Present Value: T~~t~~he current value of a past or future sum of money as a function of an investor's time value of money.

Real Discount Rate: A~~a~~ discount rate that excludes the rate of inflation.

Repair Cost: A~~a~~ny cost of unscheduled upkeep of a building system that does not require replacement of the entire system.

Replacement Cost: A~~a~~ny cost of scheduled replacement of a building system or component that has reached the end of its design life.

Residual Value: T~~t~~he value of a building or building system at the end of the study period.

Study Period: T~~t~~he time period over which a Life Cycle Cost Analysis is performed.

Bibliography

Sieglinde K. Fuller and Stephen R. Petersen, *NIST Handbook 135: Life Cycle Costing Manual for the Federal Energy Management Program*, Washington: U.S. Government Printing Office, ~~1996~~2022.

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Wolter J. Fabrycky and Benjamin S. Blanchard, *Life-Cycle Cost and Economic Analysis*, Englewood Cliffs, NJ: Prentice Hall, 1991.

American Society for Testing and Materials, *Standard Practice for Measuring Life-Cycle Costs of Buildings and Building Systems*, Philadelphia: ASTM, 1994.

Professional Services for School Capital Projects

P U B L I C A T I O N C O V E R

April 20, 2023

Issue

The department has initiated an update of the *Professional Services for School Capital Projects* and is seeking committee approval of the revised publication for department and stakeholder use.

Background

Last Updated/Current Edition

Publication last updated in 2018. Current edition available on the department's website: education.alaska.gov/facilities/publications/ProfessionalServices.pdf.

Summary of Proposed Changes

The current proposed edits to the publication include straightforward updates of the prior publication and new sections addressing the solicitation of a commissioning agent and independent value analysis services.

Version Summary & BRGR Review

Drafts of the publication were presented to the committee at the following meetings:

December 1, 2022 – validation survey results, minor clean-up edits proposed, committee requested to see proposed commissioning agent and value analysis edits before public comment.

February 23, 2023 – additional edits addressing solicitation of commissioning agent and addressing value analysis.

April 20, 2023 – additional edits from public comment review; department requests committee approval of final draft.

Public Comment

Public comment period opened March 1 and closed April 3, 2023. The department received comments from two individuals during the open period and additional comments from one entity after the comment period. The department responses through the Facilities unit are included with this paper.

BRGR Input and Discussion Items

Below are questions and comments developed by DEED during the revisions of this draft. Outlined below for consideration by the BRGR Committee:

- Do the proposed edits sufficiently address the expectations for value analysis services? Is it in a logical location? Is there a different DEED publication where the information is better suited or should also be addressed?
- Do the proposed edits sufficiently address the expectations for commissioning agent and commissioning services? Is there a different DEED publication where the information is better suited or should also be addressed?

Options

Approve final publication for issuance and use by the department.
Amend final publication and approve for issuance and use by the department.
Seek additional information.

Suggested Motion

"I move that the Bond Reimbursement and Grant Review Committee approve the department's proposed update of the *Professional Services for School Capital Projects* for issuance and use by the department."

DEPARTMENT OF EDUCATION AND EARLY DEVELOPMENT

COMPILED PUBLIC COMMENT AND DEPARTMENT RESPONSES

PROFESSIONAL SERVICES FOR SCHOOL CAPITAL PROJECTS GUIDELINES FOR SCHOOL DISTRICTS

MARCH 1 TO APRIL 3, 2023

PUBLIC COMMENT RECEIVED	DEED RESPONSE
Would appreciate further expansion on the solicitation and expectations for procured value analysis services. *Anonymous 3-3-2023*	See the *Capital Project Administration Handbook* for VA expectations. Solicitation is the same for all professional services. Level 1 VA is performed by the design team and thus can be included in the design services contract. Levels 2-4 require an independent lead entity not associated with the design team under separate contract
Are commissioning services able to be provided with the design services contract? Or do they have to be separate contracts or with separate entities? (Page 13) What is the relationship between a commissioning agent and commissioning services? What actions/services are performed by who? What are the basic services that an agent should be providing/contracted for by a district? *Anonymous 3-31-2023*	See the *Capital Project Administration Handbook* for commissioning expectations. The definition of commissioning agent is in 4 AAC 31.900(32): an individual who is certified with a recognized standards organization approved by the department to provide commissioning services, who may be an employee of the school district or an independent design consultant hired on behalf of the school district. Contract will generally be separate. CxA basic services are identified in 4 AAC 31.900(32).
Maybe discuss who should be on this [capital planning] committee. Facilities, maintenance, custodial, education, etc? [Page 2] *Anchorage School District 4-4-2023*	Thank you for your comment, see proposed edit.
Does this entity require using professional services procedures? [Page 2] *Anchorage School District 4-4-2023*	Uncertain which entity is being addressed in this question. Only the professional services of designers, construction/project managers, and commissioning agents need to follow the DEED regulation 4 AAC 31.065.
Educational adequacy assessment for existing buildings should be performed prior to, or in conjunction with, an ed spec [Page 6] *Anchorage School District 4-4-2023*	The following paragraphs in the Educational Specification section address the need for assessing new or configured space, including review of the education program, etc.

PUBLIC COMMENT RECEIVED	DEED RESPONSE
Community engagement planning should be part of pre-design services and carried into design services [Page 8] *Anchorage School District 4-4-2023*	Thank you for your comment.
Also a good idea to invite a board member [to the Project Team] [Page 9] *Anchorage School District 4-4-2023*	Thank you, see proposed edit.
"their" [instead of "his"] [Page 9] *Anchorage School District 4-4-2023*	Thank you, this has been edited to "the".
Delete ["be"] [Page 9] *Anchorage School District 4-4-2023*	The comment is to quoted text; however, have shown a deletion.
Not sure this [new language on value analysis] is correct. Cite statute and regulation. The value analysis in the Project agreement par 9 only states "...value based design... A formal value analysis MAY be required. The PAH does not have any trip lines as to what is required. How would this work for recovery of funds projects? Do not believe this supported as described. Also, "value analysis is better handled in pre-design services as well. [Page 12] *Anchorage School District 4-4-2023*	The new language is speaking to process. We concur that value analysis and engineering should occur during all project development stages. The *Capital Project Administration Handbook* language can be further developed during its next edition.
Pre-design services are highly encouraged. This is the most efficient use of consultant time by having discussion of possible designs, cost benefit analysis, and other scoping prior to actual design efforts. We have found that three or more pre-design meetings with progressive scoping and CBAs are highly beneficial. [Page 13] *Anchorage School District 4-4-2023*	Thank you for sharing your experience.
Possible reg change to "intent to negotiate" [Page 16] *Anchorage School District 4-4-2023*	We will consider in a future regulation update, thank you.
How does restricting to a few known comply with reg? [Page 17, Item 1] *Anchorage School District 4-4-2023*	This language is to be inclusive of smaller solicitations, under the $50,000 threshold.
[In item 3] internet? apps, cloud communication? 6. Computer time? [Page 23] *Anchorage School District 4-4-2023*	These additional expense types, if determined to be required for a specific project, would be considered "etc."

PUBLIC COMMENT RECEIVED	DEED RESPONSE
[Item 6] ??? discuss, overhead? [Page 24] *Anchorage School District 4-4-2023*	Thank you, no additional language was determined to be needed at this time.
Expand this entity? Is AS language set upon architect? [Page 24] *Anchorage School District 4-4-2023*	The statutory language is for any 3rd party consultant providing construction management services. However, this use of "architect" is to lead into the next paragraph discussing the need for separate accounting. The language regarding a third-party manager has been reinstated.
What about [a post-occupancy survey] at 5 years too? [Page 30] *Anchorage School District 4-4-2023*	The publication only states at least one year after student occupancy. We agree periodic surveys are beneficial to understanding the facility functionality.

Professional Services for School Capital Projects

Guidelines for School Districts

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ACKNOWLEDGEMENTS

Thanks to the Bond Reimbursement and Grant Review Committee members who reviewed the publication in its draft form and to those in the Department of Education who were responsible for the predecessor to this document including the work completed by Edwin Crittenden, FAIA, Michael Morgan, PMP, and Sam Kito III, PE under their tenure at the Department of Education & Early Development.

This document was originally prepared under contract by the Southeast Regional Resource Center and published under the name Selection & Compensation of Architectural Services for School Facility Construction by the State of Alaska Department of Education in 1985.

Table of Contents

Introduction

The construction of an educational facility is a major milestone for a school administrator and the local school board. A new school or significant renovation project, perhaps more than any other act of school officials, affects the delivery of the educational program for twenty or thirty years into the future. Policies may change; buildings remain. A well-planned, well-constructed educational facility can serve as a lasting legacy to the wisdom and care of the administration and community which planned it. Unfortunately, the converse is also true.

The purpose of these guidelines is to assist users in successfully completing school capital projects by focusing on starting those projects well - by understanding the decisions needed at the planning stage, and how the various entities which contribute to those decisions can collaborate. The guidelines highlight some of the more important administrative and legal aspects of capital projects as they relate to the various professional services that may be necessary for successful project execution. To some who may have great experience and familiarity with administration of capital projects, the guide's contents may seem obvious. Others may have had little experience in this field and will find the concepts new. In either ~~event~~instance, if the guide assists school officials in thinking through the capital project process from the earliest stages to the completion of the project, the aim will have been accomplished.

In the selection of, and contracting for, pre-design, design, and project management services, ~~it's~~ it is worth noting that sections of Alaska statute and administrative code contain stipulations that are monitored by the department on projects with state aid and with which recipients of that state aid must comply. Primarily, these stipulations are aimed at preserving the open and competitive selection of entities providing these services. Two primary references apply: AS 14.11.020 (Assumption of responsibilities) and 4 AAC 31.065 (Selection of designers and construction managers).

Professional services are often needed at every phase in the life-cycle of capital projects: planning, design, construction, operation and maintenance, and capital renewal or replacement. The format of this publication generally follows this project life-cycle and provides information and guidance on professional services and their procurement related to each phase. With respect to project delivery, the guide is rooted in the traditional project delivery method known as Design-Bid-Build. This method, which is the baseline, default method described in department regulations, establishes contracts for professional design services independent of those for construction services. It also keeps the design and construction phases of a project separate and sequential. The department has defined, and can approve, ~~other~~ alternative project delivery methods. For more information, see the department's publication *Project Delivery Method Handbook*.

Getting Started

The adage, "A thing well begun is a thing half done," is an apt philosophy for school capital projects. This section outlines three elements for consideration by school districts on how to get started on school capital projects and how professional services might ~~come to bear~~be involved in each of them.

Capital Planning

School capital projects emerge from the process of managing school facilities, and their supporting infrastructure, as capital assets. As a rule of thumb, the first five years after taking ownership of a new or renewed school facility are focused on operating the facility and assimilating it into the organization's daily mission - in our case, education. Warranty issues, planned maintenance, and minor repairs occur during this period along with the tasks associated with operating the facility. The need for professional services is usually very limited during this period. On occasion, building system specialists or skilled workers in construction trades are needed to troubleshoot operational issues or to provide training on system operation and maintenance. Following this initial operation~~s~~ phase, the need for repair of facility components with short lifespans start~~s~~ to arise. Often, user requests and mission-oriented needs ~~begin to surface~~become apparent. These are signs that the facility, or its associated infrastructure, has entered the capital asset management phase. Responding to the range of needs during this phase can require a diverse set of skills. Each school district should consider establishing a capital planning group or committee to review planning data and asset information for facilities in this phase. The planning group/committee should consist of facilities, maintenance, custodial, educational, and administrative staff. This information and data may include space utilization, student population projections, and facility renewal needs (e.g., repairs, upgrades, improvements, and replacements). The primary responsibility of the committee would be the development of a multi-year capital improvement program. Re-commissioning of relevant systems at least two months prior to the warranty date can help identify failed equipment or components and correct control system programming errors. For additional background on developing, implementing, and sustaining a capital planning program, see the department's publication, *Alaska School Facilities Preventive Maintenance and Facility Management Handbook*. If staffing and capabilities exist, the district could produce this data internally. If not, the initial need for professional services is created. Professional services in the planning phase could include educational adequacy assessments, demographic analysis, a commissioning or retro-commissioning plan, and facility condition surveys. See **Pre-Design** for additional details regarding these services.

In order to be eligible for state-aid for a school capital project, a district must produce and submit a six-year capital improvement plan (AS 14.11.011). Projects in the first year of that plan, for which state-aid is sought, must be described in detail on a capital improvement project (CIP) application (4 AAC 31.021). The department provides sufficient tools, training, and guidelines regarding the preparation of a CIP application such that an application could be adequately completed using district resources. ~~In practice, v~~Very few districts complete their own CIP

applications. Instead, most districts seek the professional services of educational facility planners, architects, and engineers, to assist them in this vital area of capital planning.

Project Management

The transition from capital asset management to project delivery - from planning to execution - is most often triggered by funding. This funding could come from a variety of sources. Often, with many of these sources, the offer of funding comes with a set of stipulations and constraints. In addition, the process of developing and delivering a capital project, by necessity involves a range of specialized expertise to achieve the goals of functionality, constructability, environmental and life safety, and operational efficiency - just to name a few. Projects can be complex. The professional service of project management has arisen to coordinate the efforts and entities needed to achieve the capital project's goals. The scope and complexity of the project will determine the need for project management services.

Called "construction management" in the applicable Alaska statutes and regulations, these project management services may be provided by qualified school district personnel, or they may need to be solicited and retained by districts under professional services contracts. For school administrators or districts with limited capital project experience, hiring a construction manager is likely to be a vital component in both getting started on a school capital project and in successfully completing that project. The Construction Management Association of America publishes a document entitled *An Owners Guide to Construction and Program Management*, which is available on the CMAA website (cmaanet.org).

A construction manager (CM) can serve as responsible party for implementation of the project from hiring of consultants to coordination of all team members. A CM can be hired either as an employee of the district, or retained under a consultant contract; however, there are statutory limitations on the amount spent for CM by consultant under AS 14.11.020(c):

> (c) The construction management costs of a project assumed under this section may not exceed four percent of the amount of appropriations for the facility if the amount of appropriations is $500,000 or less. The construction management costs of a project assumed under this section may not exceed three percent of the amount of appropriations for the facility if the amount of appropriations is over $500,000 but less than $5,000,000. The construction management costs of a project assumed under this section may not exceed two percent of the amount of appropriations for the facility if the amount of appropriations is $5,000,000 or more. For purposes of this subsection "construction management" means management of the project's schedule, quality, and budget during any phase of the planning, design, and construction of the facility by a private contractor engaged by the municipality or regional educational attendance area.

Highly qualified CMs are capable of assisting with the project management process from ~~cradle to grave~~pre-design to post-occupancy services. Following is a sampling of the types of services a district might seek from a CM professional:

- Project delivery analysis
- Site selection analysis

- Land and property issues
- Recommend project delivery method
- RFPs in support of project delivery methods
- Educational specifications
- Budget analysis and project controls
- Assist with procurement of commissioning agent ~~(CxA)~~ services
- Assist with procurement of independent value analysis services
- Project status meetings
- Permitting coordination
- Design document reviews
- Owner general requirements for bids
- Provide owner representation during construction
- Perform inspections and quality control
- Maintain project records
- Assist in substantial completion
- Project closeout & documentation
- Manage warranties
- Assist with O&M setup

Since project management services through a CM, or related entity, are often a school district's first need after securing funding, and because even that step often requires knowledge and experience not found in every district, the department has developed a request for proposals (RFP) for CM services. This template can be viewed in Appendix D and is available ~~for download as a separate file from the department's web site~~on request from the department. The template contains boilerplate and editable elements that cover the: 1) solicitation, receipt, and scoring of proposals, 2) development of anticipated services, and 3) contract administration elements (e.g., insurance, terms of agreement, etc.).

The Project Team

The purpose of ~~treating~~ addressing the topic of the project team under the **Getting Started** section of the guide is to highlight one final area of professional services to which a district might turn in order to effectively start a capital project. That service professional is an architect. There are many documents that discuss the process of completing a school capital project. Often, these documents refer to a project team. Some publications go further and identify the team members and their role in the process. Throughout this guide, sections of some of these documents are quoted or referenced as appropriate.

One such document, *You and Your Architect*, a publication of the American Institute of Architects (AIA), is pertinent to establishing a starting point for a school district embarking on a school facility project. It states, "the best way to begin a new project is for you - the owner - to reflect on what you bring to it." The document is available on the AIA website (aia.org).

Following is an excerpt from this document under a section entitled, "Getting Started":

> Whether you have extensive experience with design and construction or are coming to both for the first time, it can be helpful to ask yourself a few questions before interviewing prospective architects. You do not need firm or complete answers at this point. Rather,

these questions will help to ensure that your initial communications will be clear and productive and enable you to select the design professional best suited to your needs.

- How will your project be used?
- Do you have specific ideas on how to translate these activities into spaces and square footage?
- Do you have a site? Or will this also be a subject of discussion with the architect?
- Have you decided upon a schedule and budget?
- What are your overall aspirations for the project—aesthetic and emotional as well as practical?
- Who will be making the critical decisions - you alone, your family, or a committee of some sort?
- Where will the resources come from to create and operate your project?
- Are you willing to pay a little extra up front on systems that will save energy or bring other operations savings and pay back over time?
- Do you have previous experience with design and construction? If so, in what ways were you successful, and was the experience in any way disappointing?

A good architect will listen closely to your answers, help you solidify your goals and desires, and translate them into an effective building. Look for a good listener, and you'll find a good architect.

More detailed information and guidance regarding establishing ~~a project team~~The Project Team is provided later in this guideline under a major section heading by this same name.

Pre-Design

Prior to engaging a design team, the district is well served in properly developing the project by identifying facility conditions, the goals of the project, and the needs of the district. There are services that can assist districts in this pre-design phase of the project. While these services can be included in the design contract, it may be better for the district to perform these prior to selecting a design team. Clear and well-defined goals and conditions will assist both the district and the design team to develop ~~scope~~the scope of the project and reduce unknowns. The preceding section described how a project management consultant can often help with pre-design services.

These initial consultant services can assist new facilities with site surveys and geological surveys or existing facility renovations with condition surveys. For ~~both~~ either new educational space or reconfiguration of existing educational space, an educational specification is not only required by statute but is extremely important ~~to~~ for a successful project.

Educational Specifications

A program for design, or Educational Specifications, as it is referred to in Department of Education & Early Development (DEED) regulations, should spell out the district's complete educational requirements. The department has published a guide for developing educational specifications, which is available on the internet at:

education.alaska.gov/facilities/publications/EdSpec.pdf

By regulation, 4 AAC 31.010, DEED requires that "the chief school administrator, under the direction of the local school board, be responsible for preparation of educational specifications for all new public elementary and secondary schools, as well as additions and rehabilitations of existing facilities" for which state aid is sought. The specifications must include, at a minimum, the following elements:

1. The current year and five-year post-occupancy projected attendance area enrollments in the grades affected~~projected elementary and secondary enrollment to be served~~.
2. A statement of educational philosophy and goals.
3. The curriculum that will be housed.~~The activities that will be conducted.~~
4. The activities that will be conducted.~~The curriculum that will be housed.~~
5. The anticipated community uses.
6. The specific and general architectural characteristics required.
7. The educational spaces needed, their approximate size in square feet, their recommended equipment requirements, and their spatial relationships to other facility elements.
8. The size, use, and condition of existing school spaces in the facility (additions and rehabilitations only).
9. The recommended site and utility requirements.

10. The proposed budget and method of financing.
11. The technology goals of the curriculum and their facility requirements.

The completed educational specifications become the district's blueprint for the design of the school facility.

In many cases, much of the pre-design work for a facility may be accomplished by the district before the selection of the design team. Prior to, or in conjunction with seeking funds, most districts will establish the need for additional or reconfigured space based on enrollment projections, changes in the educational program, review of existing space, and an analysis of alternative facilities or space usage. At a minimum, districts should have a fairly detailed idea of the educational space requirements of the new or remodeled facilities which, in turn, provide estimates of square footage size and potential costs. While it is sometimes advisable to involve an architect in preliminary feasibility studies, particularly in the analysis of existing facilities and the determination of square footage, the essential pre-design work revolves around educational rather than architectural considerations.

Should a district desire other outside assistance at this point of the project, the services of an educational facilities planner or architect familiar with school planning might be beneficial. These professionals can ~~conduct an assessment of~~assess the need for new or reconfigured space, perform educational feasibility studies, and provide preliminary interpretation of curricular needs into educational specifications.

The development of educational specifications is the key to a successful school construction or remodeling project. It is during this phase of project planning that everyone concerned with the new space - teachers, administrators, students, board members, and the community at large - has the opportunity to present ideas, thoughts and desires ~~dreams~~ concerning the facility. Well-developed educational specifications ensure that the completed facility will support the planned educational program of the district. The Educational Specifications can also provide the basis for a creative, original design which may make a significant contribution to the learning process. Districts that spend time in conceptualizing the program to be offered in the new space, establishing the relationships between the various educational activities which will be carried out therein, and ~~giving~~ give attention to the smallest detail which can maximize the educational value of the envisioned spaces will reap considerable benefits in the design and construction phases of the project, as well as when the building is finally in use. An educational facility planning professional who is trained in conceptualizing and describing educational spaces can be of great help to the district and community in this activity.

Condition Surveys

For projects involving the renovation of existing facilities, a condition survey helps to define ~~conditions~~ the current condition of the facility and its components. This can help to develop the project scope and give a clearer definition of the design needs during the selection of a design team. The department has a publication, *Guide for School Facility Condition Surveys* (education.alaska.gov/facilities/publications/ConditionSurvey.pdf), to assist districts in developing a condition survey. As stated in the guide~~'s introduction~~, "~~It~~ …it is anticipated that

the on-site condition survey will be accomplished by a team of professionals ~~and/or tradespersons~~ with the necessary expertise to inspect the various building systems being included~~assess the various areas~~." However, ~~with the exception of~~except for the regulatory data section, most of the checklists could be ~~utilized~~ completed by experienced maintenance personnel which districts may have on staff~~"~~. Condition surveys are required for major renovations and highly recommended for all other renovations and component replacement projects.

Additional Pre-Design Services

Other pre-design services that can assist districts when developing projects and add clarity when engaging in design services include:

- Surveying: For existing sites this could be re-establishing property lines and site improvements. For new sites this establishes property lines, elevations, and any right of ways or special conditions.
- Site Investigation / Geotechnical Survey: This service helps to establish design criteria for foundations, septic systems, wells, water infiltration, and subsurface water elevations that might influence design or construction. This information can help to decide site selection or suitable locations within a site prior to design. Site investigation is a distinct budget category in DEED-funded projects, so separately tracking the expense is helpful.
- ~~Archeological Survey~~Cultural Resources Review: As ~~in~~ with the above, the cultural resources review (previously known as an archeological survey) could assist in site selection and is required for new school sites.
- Project Delivery Method Analysis: It is sometimes important to consider various project delivery methods such as Design-Build or Construction Manager/General Contractor arrangements during pre-design. As an example, entering into a design contract for complete design and construction administration services could preclude the use of Design-Build at a later point in the project.

Once the project scope and conditions have been established, the selection process for engaging a design team can begin.

The Project Team

An initial project team should consist of individuals and groups with a stake in the outcome of the project, as well as those with the expertise to provide those stakeholders with the information necessary to make sound decisions. There are alternate compositions and names for project teams. However, all stakeholders should have a place on the team. Team members may include representatives from the district administration, school board, ~~the~~ educational specifications committee, ~~the~~ proposed principal and faculty, ~~the~~ students, ~~the~~ parents, community members, and necessary educational and facilities professionals. In addition, a project coordinator is essential for good management and continuity. At the appropriate point, the design team and commissioning agent should be added to the project team.

The school district project coordinator should be the lead or chairperson of the project team and the principal contact for the project team with authority for approvals of both design and construction matters. Generally, this position's responsibilities can be handled by an in-house representative with assistance from the design team during construction. However, many districts have found that a professional project manager (~~See~~ see the ~~Construction~~ Project Management discussion in the ~~Introduction~~Getting Started section above) can relieve the district of burdensome coordination activities, thus allowing district personnel to focus on educational delivery.

The project team has overall responsibility for coordination of all aspects of the project from initial needs determination to post-occupancy evaluation. Many of the duties may be assigned to individual project team members or subcommittees. In smaller districts, the team may delegate responsibilities to the project coordinator or the district superintendent, or the school board may assign responsibilities to ~~that~~ an individual.

In addition to being the official administrative contact ~~with~~ for the design team, the coordinator should be a liaison between other groups and committees providing information such as educational specifications, site information, and educational programming. Beyond the design phase, the project coordinator should serve as the ~~owners~~owner's representative for the construction contract.

Reference should be made to a document listed in Department of Education & Early Development (DEED) regulations as a guideline entitled *The CEFPI Guide for Educational Facility Planning, 2004 edition*~~*Guide for Planning Educational Facilities*, CEFPI, 1991~~, specifically the section "The Planning Professionals." The design team is generally headed by a principal or associate of an architectural firm and consists of members of ~~his~~ the firm and consultants. Quoting from the document mentioned above:

> A district should [~~be~~] carefully review proposed services of such a project manager and the architect; traditional services of each can widely overlap. The architect's services are explained in the next chapter. The design team members, besides those who are directly involved in architectural design and coordination as associates of the architect, are normally consultants to the architect who serves as

> team leader. If a district feels they can best be served by certain named consultants, these should be identified in request for proposal documents as a district choice but not as a requirement. Architects may feel more comfortable with certain consultants based on their past experiences. As prime consultant the architect is responsible for the work of his consultants although they in turn are responsible to him. The architect's consultants, or they may be in-house staff, usually consist of structural, mechanical and electrical engineers. In addition, for some projects, consultants may include civil soils, survey, and utility engineers as well as those with specialties including cost estimating, acoustics, kitchen/food service, technology, school planning, and construction management or contract administration.

An architect A/E consultant is an important member of the project or planning team, from initial conceptualization of the project through substantial completion ~~of the building itself~~. It is the architect who has the primary responsibility for translating educational program concepts and needs into educational facilities that are effective learning spaces. An architect must understand the desires of the client as well as the technical aspects of the project; therefore, in selecting an architect, intangible considerations, such as mutual respect, trust and compatibility of working styles, can be as important as technical competence. Dr. Basil Castaldi, a well-known authority on educational facilities planning, states it well:

> In and of itself, however, the employment of an architect does not automatically assure a board of higher authority that he will design a school to satisfy their institutional needs. The architect should be creative, competent, flexible, understanding, perceptive of educational needs, open-minded, aesthetically oriented but cost-conscious, imaginative, practical, and cooperative in spirit. [3]

Success in selecting an architect, whether an individual or a firm, who can bring the attributes listed above to a school construction project depends in large part on how thoroughly a district conducts pre-selection activities.

There are times when a district will be looking for the services of ~~on~~an engineering consultant, such as when considering structural, mechanical, electrical, foundation, or site work that may not require the participation of an Architect. In such cases, the district may consider the directions in the following sections of this guideline to apply equally to the selection of ~~and~~an engineering consultant. Therefore, terminology from this point forward will refer to the Architectural/Engineering or A/E consultant.

Commissioning

An often overlooked but vitally important member of the team is the commissioning agent (CxA).

Beyond being required for each substantially upgraded building system in accordance with 4 AAC 31.080(j); a commissioning agent provides a clear value to the district and the facility. That said, it is first important to know what "commissioning" (Cx) is and the value it provides.

The Project Team

Essentially, commissioning is a process that examines, tests, and ensures that all of a building's systems perform as designed, ensure that contract documents (plans and specifications) are followed, help the owner operate and maintain the system, and ultimately ensure the system meets the needs of a building's occupants. The benefits of commissioning to the district and facility include:

- Cost benefit analysis of design solutions for the most efficient system;
- Energy and money savings;
- Improved comfort for the building's occupants;
- Better system functionality, improving air and water quality;
- Improved and comprehensive operation and maintenance instructions; and
- Building and equipment optimization, which extends operational lifespans.

Respectively, the commissioning agent therefore serves as an advocate to the owner by directing the commissioning process.

Though much of the agent's work happens during a project's construction phase it is important to create a commissioning plan and bring on a commissioning agent as early in the design phases as possible. Early involvement will help in the development of a logical and comprehensive system and can provide important considerations to the designers. It is important to note that the agent does not replace or subvert the design engineer, but rather compliments them. A commissioning agent is a specialist who advises the design team through the design phase and ensures compliance during construction with the designer's intent.

If properly contracted and utilized a commissioning agent will:

- Regularly review plans throughout the design process to verify the design is consistent with the owner's intent and goals.
- Integrate commissioning requirements in the construction bid and contract documents.
- Develop checklists for the designer's specifications for all equipment.
- Develop functional performance test procedures for all equipment and systems.
- Coordinate the commissioning team for the mechanical, electrical, fuel oil, controls, and building envelope systems.
- Witness the functional performance testing.
- Complete a commissioning report, which provides needed changes and advice to optimize all components, equipment, systems, or features.
- Review operation and maintenance manual for completeness
- Verify that training was conducted for appropriate personnel on commissioned systems.
- Develop a reconditioning management manual that helps to measure building performance and instruct district personnel how to make adjustments to optimize the system as part of preventive maintenance.

The Scope of Services

Districts that wish to obtain the most effective design services will spend time *before* the selection of the A/E consultant in determining the range of services it will need. Certain services are required from the design professional during each phase of the project. In addition, A/E consultants can provide a broad range of supplemental services. These basic and additional services are well described in various publications including a document previously mentioned entitled *You and Your Architect* published by the American Institute of Architects (AIA). Districts are encouraged to review descriptions of services available prior to A/E consultant selection to obtain at least a general idea of those services which may be requested.

The services that may be required of a design firm can be characterized as "basic," i.e., those which are performed normally by a design professional ~~in order to~~to move the project through construction, and "additional" or "supplementary", i.e., services which may be required or desired to enhance or respond to critical issues related to the project.

Basic Design Services

Basic design services are described as follows:

1. **Schematic design services** consist of the preparation of drawings and other documents that serve to illustrate the general scope, scale, and relationship of project components. The documents from this phase of work need to be reviewed and approved by the department before the district authorizes the consultant to proceed to the design development phase [4 AAC 31.030(b)(3)]. Work in this phase incorporates information gathered from the district in the form of Educational Specifications, public meetings, and stakeholder meetings. Typical services include: civil, structural, ~~mechanical~~mechanical, and electrical concepts; architectural, interior ~~in~~ and landscape design concepts; estimate of probable construction costs based on the schematic design documents; and consultation and review. When schematic design is complete and submitted to the department for review, value analysis is the next step in the process. Value analysis should occur prior to preparation of the design development documents. This process is essential to achieving the most cost-effective project possible. Refer to the Capital Project Administration Handbook (education.alaska.gov/facilities/publications/CapitalProjectAdminstrationHandbook.pdf) for more information regarding the various levels of value analysis and a description of the deliverable product expected by DEED as a submittal.
2. **Design development services** consist of the preparation, from the approved schematic design documents, of drawings and other documents that serve to fix and describe the size and character of the entire project as to structural, mechanical, and electrical systems, materials and such other essentials as are appropriate. Accepted design modifications resulting from the value analysis process should be incorporated at this stage. The documents from this phase of work need to be reviewed and approved by the department before the district authorizes the consultant to proceed to the construction document phase [4 AAC 31.030(b)(4)]. Typical services include: civil, structural, mechanical and

electrical design development; architectural, interior and landscape design development; estimate of probable construction costs; and regulatory agency review.

3. **Construction document services** consist of the preparation, from the approved design development documents, of drawings and specifications that provide in detail, the requirements for construction of the entire project. The documents from this phase of work need to be reviewed and approved by the department before the district authorizes the consultant to proceed to the bidding phase [4 AAC 31.030(b)(5)]. Typical services include: complete civil, structural, mechanical and electrical construction documents; architectural ~~working~~ contract documents; a more detailed estimate of probable costs; and document review/coordination. By the time construction documents are complete the commissioning plan should also be finalized.
4. **Bid services** consist of the preparation, from the approved construction documents, of ~~bid~~ documents for ~~obtaining~~ soliciting bids and awarding contracts for construction for approval by the district. Typical services include: preparation of bidding documents; bid procedure; bid evaluation; assistance, with owner's attorney, on construction contract agreements; and analysis of alternatives/substitutions.
5. **Construction services** consist of providing assistance to the district in its administration of the construction contract commencing with award and terminating following final acceptance of the project and the contracting agency's approval of the architect's final invoice for all services throughout the construction phase. Typical services include: limited construction observation; shop drawing review; review of contractor pay requests; change order review/approval; testing and inspection coordination; and project close out assistance. [4]

Additional or ~~Supplemental~~ Supplementary Services

In addition to the above five basic services areas, there are four additional phases of a construction project during which the additional services of a design or other facility professional may be required:

1. **Pre-design**, where an architect may be involved with facility programming; space schematics; project budgeting; surveys of existing facilities; economic feasibility studies; and project scheduling.
2. **Site analysis**, in which architectural services are typically required for site analysis and selection; site development and utilization studies; environmental studies; cultural resources review; zoning processing assistance; utility studies; and project budgeting.
3. **Post-construction**, at which time the architect provides maintenance and operational programming for the electrical and mechanical aspects of the facility; start-up assistance; record drawings; warranty review; and post-construction evaluation. [5]
4. **Commissioning**, in which a qualified professional is retained to ensure the building is operating as designed at the point of turn over to the owner. These services can start in pre-design and continue into post-construction as indicated above. Concluding with a final commissioning report.

The Scope of Services

Both Alaska's Department of Transportation and Public Facilities (DOT&PF) and AIA identify additional or ~~supplemental~~ supplementary services which may be requested of design firms. Such services will vary from project to project, and may include, but are not limited to the following:

1. perform preliminary energy audits;
2. attend meetings or conduct hearings to facilitate design review and obtain required approvals;
3. provide detailed estimates of construction costs;
4. prepare record prints (As-Built drawings) of significant changes made during the construction process;
5. serve as a member of an Art Advisory Committee to determine the type and ~~site~~ location of public art works;
6. determine if a proposed site has historic, prehistoric, or archeological value under applicable federal or state statutes;
7. select furnishings, fixtures, and equipment;
8. design special furnishings;
9. perform life-cycle costs and cost-benefit analysis;
10. conduct special studies ~~or design special computer applications~~;
11. prepare specialized or elaborate graphics or models for presentations; and
12. provide daily or periodic on-site observations of construction activities.

Statement of Services

The "Standard Statement of Services for General Architectural and Engineering Design" of DOT&PF's *Professional Services Agreements* (link: Large Procurement Manuals, Procurement and Contracting, Transportation & Public Facilities, State of Alaska) provides a more detailed description of both basic and additional/supplementary services, as does the standard form of contract of the AIA (document B101).

The AIA publishes a *Compensation Management System* which provides a checklist of both basic and supplemental services. The checklist provides a convenient method for districts in determining the scope of architectural services desired. A copy of the AIA checklist from the above-referenced document is attached in ~~the appendix~~Appendix A. Contract documents may be obtained from:

American Institute of Architects (link: AIA)
1735 New York Ave.~~nue~~ NW
~~N.W.,~~ Washington, D.C. 20006

or from

Alaska Chapter of American Institute of Architects (link: Alaska - AIA)
~~807 B Street,~~P. O. Box 244141

The Scope of Services

Anchorage, AK 995240~~01~~
www.aia.org

As mentioned earlier, districts should have a fairly firm idea of the scope of services to be requested of the A/E consultant before a consultant is selected, particularly where additional or supplementary services are required.

The Selection Process

The means used to select a~~n A/E~~ professional consultant should depend somewhat on the size and scope of the contemplated project. For small projects with ~~design or Cx~~ fees estimated at less than $50,000 - where costs of obtaining and screening proposals from several firms may exceed the benefits of having multiple proposals - the district may choose a~~n~~ professional ~~architect~~ who has performed successfully for the district in the past~~,~~ or set up a shorter version of the process described below.

For larger projects~~, however,~~ it is generally to the district's advantage to use a process which will allow for comparison between several individuals or firms. The discussion which follows focuses on setting up and implementing a comparative selection process which has proven to be effective in selecting design services for larger school construction projects.

Department of Education & Early Development (DEED) regulations regarding selection are as follows:

> **4 AAC 31.065 SELECTION OF DESIGNERS AND CONSTRUCTION MANAGERS.** (a) If a school district determines that it is necessary to engage the services of a private consultant to provide design, ~~or provide~~ commissioning, or construction management for an educational facility with money provided under AS 14.11.011 - 14.11.020, or for a project approved for reimbursement of costs under AS 14.11.100, and the estimated cost of the contract is more than $50,000, the contract shall be awarded to the most qualified proposer after evaluating proposals submitted in response to an approved solicitation. ~~t~~The selection of the consultant shall be accomplished by soliciting written proposals by advertising at least 21 days before the proposals are due by providing notice through publication in a newspaper of general circulation. ~~at least 21 days before the proposals are due. The contract shall be awarded to the most qualified offeror, after evaluating the proposals submitted~~The department may approve an alternate means of notice through publication on the Internet if the website has the express purpose of advertising similar solicitations, has unrestricted public access, and is equally likely to reach prospective proposers.
>
> (b) Nothing in this section precludes a school district from retaining the services of a consultant on an as-needed basis under a multi-year contract, if the term of the contract is not more than five years.
>
> (c) The school district shall provide a procedure for administrative review of complaints by aggrieved offerors which allows them to appeal, within 10 days after the notice of intent to award, requesting a hearing with notice to interested parties, for a redetermination and final award in accordance with law.
>
> (d) The department may deny or limit its participation in the costs of design, commissioning, or construction management for a project eligible for grant funding under AS 14.11.011 or for reimbursement under AS 14.11.100 if the school district does not comply with the requirements of this section.
>
> ~~Authority: AS 14.11.017 AS 14.11.020 AS 14.11.132~~

As mentioned previously, selection of ~~design or Cx~~ professional consultants must be undertaken as a qualifications-based process rather than one that is fee-based. The A/E consultant will lead

the design effort of the design or planning team and the team will need the most qualified individual or firm, rather than the least expensive.

The final selection of the A/E consultant or firm is the responsibility of the local school board. However, in most cases, the board will wish to delegate the responsibility for initial screening and review of potential candidates to school district administration, or to a committee such as the project or planning team. It is recommended that the initial screening be conducted by a minimum of three persons. The initial screening process should result in forwarding to the board a "short list" of between three and five candidates for final consideration.

Educational facilities planners can work with the district through the A/E consultant selection phase of the project, including negotiation of ~~architect~~ services, fees, and contracts. Some planning firms also offer project management services. During the pre-design period of the project, the district should explore all options for project management services and make its decisions about the use of consultants, prior to bringing on the A/E consultant. If project management is contracted to an outside organization, communication protocols and channels must be clearly identified to avoid confusion or misunderstandings during the life of the project.

The competitive bid process generally does not apply to the procurement of professional services such as that of an A/E consultant ~~or firm~~. Districts are free to solicit and choose design services in many different fashions, although city/borough districts may be subject to local ordinances. All districts~~, though,~~ must exercise prudence in the management of public funds.

Prior to seeking proposals from interested individuals or firms, the following procedures will need to be completed:

1. Solicitation of potential applicants, which includes the decision to solicit from a few known individuals or firms, or to advertise widely; to solicit only from local individuals or firms, or from a larger geographic area; etc.[1]
2. Preparation of project information which will be used by prospective applicants to prepare their presentations. Including the program for design or educational specifications.
3. Determination of information to be requested from responding individuals or firms, at least in general form. In most cases, the screening criteria will dictate the areas to which firms will respond.
4. Determination of screening criteria, which will spell out in some detail the items to be used in the review of proposals; the weights which will be assigned to the various items; treatment of "joint ventures" or multiple-firm proposals; etc.

After initial screening of the responding individuals or firms, follow these steps:

[1] Reference 4 AAC 31.065(a), quoted above. ~~"If … the estimated cost of the contract is more than $50,000, selection of the consultant shall be accomplished by soliciting written proposals by advertising in a newspaper of general circulation at least 21 days before proposals are due."~~

The Selection Process

1. Further review of candidates on the "short list" of individuals or firms ~~or individuals~~ who have been rated highest in the initial review. All of the individuals or firms on the "short list" should be technically capable of performing the required services. Because of the importance of intangibles, such as rapport, personality, ability to listen, etc., it is strongly recommended that individuals and firms on the "short list" be interviewed by the full school board or the board-designated selection committee. Interview schedules, a list of topics to be covered in the interviews, and a method of evaluating interviewees should be determined prior to inviting selected individuals or firms to participate and provided to the short list.
2. Research on responding individuals or firms, which will require follow-up of references given by respondents; actual visits to completed facilities designed or commissioned by the responding individuals or firms may be considered for the top ~~firms~~ candidates identified in the initial screening.

Once the selection procedures have been established, the district will begin to solicit proposals. A knowledgeable consultant can be retained to perform this task, complete the initial screening with the committee, and submit a "short list" to the district. Whoever performs this task should have information on the following areas prepared to send out to all parties interested in presenting a proposal:~~.~~

1. Project summary, or a brief description of the proposed facility, including intended use, location, square footage, and total funds available for both design and construction.
2. Community description, which contains information about the location, ethnic and economic background, climate, and other pertinent characteristics of the community.
3. Description of the educational philosophy and program of the district, including any particular instructional methods, grade groupings or other characteristics which have design implications.
4. Site description, including any particular characteristics which will affect design options.
5. Funding sources and estimated budget amounts, including information about phasing or other constraints.
6. Timeline, which indicates the anticipated dates of architect selection, design completion and substantial completion of construction.
7. Scope of services initially proposed, which includes any additional services beyond the basic services to be requested.
8. Selection procedures, which indicate the events and timeline for the selection process.
9. Selection criteria, which detail those areas of experience and capacity which will be weighed in the selection process.
10. Description of proposal format, which should speak to any unusual formatting requirements of the school district. In general, firms and individuals should be allowed to format responses in any manner which yields the requested information.
11. Deadline for submission, indicating to whom and where the proposals should be sent. The district should also indicate the number of copies required.

The Selection Process

Screening the Applicants

1. Review of written proposals - Once proposals have been received, all proposals should receive an initial review utilizing the rating criteria and weighting system established earlier. A ~~Suggested *Performance Rating Review*~~*Sample A/E Firm Rating System*, developed by the ~~South East~~Southeast Regional Resource Center, is included in Appendix ~~A~~B Sample A/E Firm Rating System. Other checklists or methods which result in a uniform analysis of all submitted proposals can be developed by the district. On the basis of this initial screening, a "short list" of the three to five most qualified firms should be prepared.
2. Interviews of "short list" firms or individuals - Experience has shown that a formal interview before the full board or the ~~architect~~ selection committee is the most useful method of evaluating the intangible characteristics which contribute significantly ~~greatly~~ to a good ~~district to A/E consultant~~ working relationship between the district and the professional consultant. Interviews should be carefully planned to assist the board or selection committee ~~make~~ in making judgments on the human relations aptitude as well as the technical skills of the persons interviewed. A standard format and an ~~general~~ insightful list of questions determined beforehand will help the interviewers to make the best opportunity of the time ~~allowed~~ allotted and will assure that each individual or firm ~~or individual~~ is asked to respond to the same ~~types of~~ inquiries.
3. Reference checks - In addition to participating in an interview, individuals or firms ~~and individuals~~ on the "short list" should undergo a background check of references. Much can be learned - and much grief avoided - if the district or its agent takes a little time to call other districts or organizations which have been clients of the individuals or firms under consideration. Results of this background check should be given to the board or selection committee along with the ~~firms'~~ written proposals.

In some cases, ~~actual~~ on-site visits to other completed facilities which have been designed by the firm(s) under consideration can be helpful. Generally, the facilities of only the top two contenders would be viewed, given the time and travel funds involved. However, if such visits are conducted, information about the effectiveness of the facility should be obtained from the users (teachers, students, maintenance personnel, etc.,) as well as from the administration or the board.

Selection of Preferred Firm or Individual

Upon completion of the screening activities, the district should list the individuals or firms in the order of preference and begin to negotiate a fee with the first choice. If negotiations are not successful, the district can then proceed to negotiate with the next listed individual or firm. If the district cannot decide between two or more ~~firms~~candidates, the district may request an additional interview or additional written information. However, the district and school board should avoid asking the ~~firms~~ candidates to provide design sketches, models, or other services as part of the selection process.

Utilizing Multi-Year Term Contracts

One method of selecting ~~an~~ a ~~A/E~~professional consultant is through a multi-year term contract[2]. This allows the school district to advertise and go through the selection process once and contract with a consultant, or more than one consultant, for up to five years. This can be used for a consultant team for major projects, a specialty consultant, like a mechanical engineer, for specific types of projects. ~~Term contracts can also be used for~~ Cx ~~and construction management services.~~ This process can be ~~advantages~~ advantageous ~~where~~ if a district forecasts many projects in the future and wishes to have consultants ready to proceed with a project without having many separate selection proceedings. School districts should keep records of their multi-year term selection process ~~in order~~ to show that the selection meets state regulations for advertising, appeal, and other requirements.

An example of how this process works for one school district:

1. A school district anticipates a large number of projects over the next three years and wishes to have consultants available in order to reduce time due to multiple selection procedures. The projects anticipated range from large school projects, mechanical systems projects and some lighting projects.
2. The school district advertises a request for proposals and qualifications for Architectural teams, as well as mechanical and electrical engineers. The advertisement sets a term contract for three years and annual limits of a million dollars for Architectural and a half a million dollars for mechanical and electrical consultant contracts.
3. After a minimum 21~~-~~-day ~~advertisement~~advertising period, proposals and qualifications are received and evaluated. The top three ranked ~~A/E consultants~~candidates in each category are chosen to be offered term contracts, subject to a 10-day appeal period.
4. Upon initiation of the first project, the consultant on the top of the appropriate list and the school district review scope and negotiate a fee. A project task order is initiated and the project proceeds.
5. Subsequent projects ~~cycles~~ cycle through the list in order until the end of the term contract or the annual limit is met.

This is but one example of how the multi-year term contract process works.

Although cost considerations are not a part of the ~~design team~~ professional consultant selection process in the same manner as in a competitive bid situation, the school board may wish to consider fee schedules in coming to a final determination. However, in most cases, only the general fee structure is available for comparison; ~~architects~~ individuals or firms are unlikely to respond favorably to requests for a quote for services until they can fully review the owner's scope of work. Determination of ~~design~~ costs is usually arrived at through negotiations with the

[2] 4 AAC 31.065(b) "Nothing in this section precludes a school district from retaining the services of a consultant on an as-needed basis under a multi-year contract, if the term of the contract is not more than five years."

successful proposer. Items to be considered in such negotiations are covered in the following section.

Negotiation of Services and Compensation

Once a~~n A/E~~ professional consultant has been selected, negotiations should take place between the district and consultant to identify the scope of services to be provided and the fee that will be paid. It is important for districts to realize that because selection of ~~design~~ professional services is usually not governed by laws directed at competitive bid projects, districts have considerable flexibility in negotiating the terms and conditions of a ~~design~~ professional services contract. In order to make the most of this flexibility, districts are advised to have a ~~well~~ thoroughly developed ~~idea of the~~ scope of services to be requested well ahead of sitting down to negotiate a contract.

"Basic services" are described by the Department of Transportation & Public Facilities (DOT&PF) and are similar to those described by the American Institute of Architects (AIA) (refer to this guideline's **The Scope of Services** section). The basic services are predetermined, so this should provide a starting point for negotiations.

A. Determining Final of Scope of Services

The services requested of an A/E firm can be characterized either as "basic," (i.e., services performed normally by a design professional ~~in order to~~to move the project through construction); and "additional" or "supplemental," (i.e., services required or desired beyond basic services).

The scope of services, proposed compensation, and the contract document should be reviewed and agreed upon. The following sections on compensation and the form of contract should give the owner background for negotiating.

As previously stated, the district should have a fairly firm idea of the scope of services to be requested of the ~~architect~~ professional consultant before selection, particularly where additional services are required. The scope of services may be modified during the negotiation process, but it should not be left to the ~~architect or architectural firm~~consultant to determine what will or will not be provided.

Compensation

The total cost ~~of design services~~ will be dependent on the scope of services required. Once the scope is set, the ~~A/E~~ consultant will indicate the amounts to be charged for basic services broken down by phase (schematic design, for example) and each selected additional service. Charges will include professional fees and expenses, both of which are negotiable. Compensation may be by a single method of payment for all the work required plus other agreed-upon expenses, or it may involve different methods for different elements of work. Districts should be aware of the more common methods of payment utilized for school facility design and services: lump sums, specific hourly rates, and professional billing rates, each of which is described below. An additional method, cost per unit of work, is also used by architects. Because it is typically used only when dealing with apartment building units, hotel rooms, or other identical units~~, however~~, it is seldom encountered in educational facility construction.

1. Lump sum is the method whereby the ~~architect~~ consultant is paid a fixed dollar amount for specific services. The amount includes profit, direct salary costs and indirect costs.

2. Specific hourly rates, whereby the ~~architect~~ consultant is paid fixed hourly rates for each class of employee directly engaged in providing services of indefinite duration. The rates include profit, direct salary costs, and indirect costs.

3. Professional billing rates, an alternative to specific hourly rates, whereby the ~~architect~~ consultant is paid fixed hourly rates for specifically named employees engaged in providing services of indefinite extent, plus a percentage, also referred to as a multiple, for indirect and non-reimbursable direct costs, and for profit.

The following definitions apply to the terms used above:

1. Direct salary costs consist of the actual hourly wage rate for time directly chargeable to the project, plus an allowance for payroll overhead.

2. Payroll overhead consists of all employee-related costs and personnel benefits, including life and medical insurance, sick leave, vacation and holiday pay, social security, ~~workmen's~~ worker's compensation, pension retirement contributions, and other similar employee-related costs. Overtime for non-salaried, hourly wage rate employees may be included, if approved in writing by the district.

3. Indirect costs include allowable expenses not directly identified with a single project. Indirect costs include salary and non-salary costs such as general administrative salaries, recruitment of employees, office rents, maintenance and utilities, office supplies, etc. Indirect costs are ~~payable~~ calculated as a ~~multiple~~ multiplier or percentage of direct salary costs.

Determining Reimbursable Expenses

In addition to fees, which cover salaries, profit, and indirect costs, most projects require the A/E consultant to provide services which involve additional expenses. Such direct non-salary costs should be identified specifically as reimbursable expenses which will be paid upon receipt of documentation that the expense was incurred. Transportation and per diem are the most common reimbursable expenses. Others include:

1. Cost of subcontracts when these have been identified specifically within the professional services agreement.

2. Fees for regulatory approvals paid to authorities having jurisdiction over services provided by the agreement. Such fees include local, state, or federal permitting costs.

3. Expenses for telecommunication charges, including telephone, teleconference, fax, etc., incurred in the provision of services under the agreement.

4. Expenses for postage and handling of materials required by the agreement.

5. Expenses for reproduction of reports, drawings and specifications in excess of that which would normally be required (usually two copies).

6. Computer time for special applications required by the district.

7. Expenses for producing specialized or elaborate models, promotional materials, and presentations required by the district.

8. Other expenses identified in the contract.

As can be seen by the above listing, the amount of reimbursable expenses allowed is generally under the control of the district in that such expenses are triggered by the amount of travel and other activities required by the district. Because such expenses can mount up quickly, districts are encouraged to set a maximum amount for which expenses will be reimbursed in the agreement itself, unless further authorized by the district.

Determining Amount of Compensation

Determination of final costs of ~~design~~ services will be the result of negotiation on the various fees requested by the ~~design firm~~professional consultant, plus the amount of reimbursable expenses to be allowed by the district. Districts can use several methods in estimating the limits of compensation. A simple, common method is to use a percentage of construction costs. Compensation for basic services range from 10% of estimated construction costs on small projects to 6% for large projects. This method should be used with care and is best suited to projects where the scope of services is typical and is mutually understood by ~~the~~ all parties - often due to ~~having~~ a history of substantially similar projects. Because of the wide range of construction costs throughout the regions of Alaska, the compensation for basic services with this method should be calculated upon an estimated cost for identical work in Anchorage. To this fee can be added extra overhead items such as transportation, weather conditions, staff living and travel expenses, telephone and courier deliveries, etc. as additional or supplemental services. Additional services and reimbursable expenses will vary, depending on the extent of services required. Even if not used as the basis for a ~~design~~ fee, the percentage of construction costs can be a helpful back-check or comparison to fees developed using other methods. Districts are cautioned that construction costs, not total project costs, should be used as the basis for calculation if a percentage is used.

Some confusion may exist regarding the application of Section 14.11.020(c) of Alaska Statutes dealing with Construction, Rehabilitation, and Improvement of Schools and Education-Related Facilities. This section limits the costs of construction management to 4% for construction projects of $500,000 or less, to 3% for projects over $500,000 but less than $5,000,000, and to 2% if the project is $5,000,000 or more. However, this section refers to the "management of the project's schedule, quality, and budget during any phase of the planning, design, and construction of the facility by a private contractor engaged by the municipality or regional educational attendance area." It does not place a percentage cap on the amount that can be expended for design and commissioning agent services. Nor does it differentiate between those services performed by an architect under

basic services and those to be performed by the owner ~~in this administrative and accounting rate~~ (or by a third ~~-~~-party contract manager).

Under AIA document ~~B141~~B101, the *Standard Form of Agreement between Owner and Architect,* it is acceptable for an architect to provide the services identified in statute as construction management. If construction management and design services are awarded to a single entity, it will be necessary to account for the two categories separately. If a district chooses to retain an independent construction manager, there must be a clear distinction between the responsibilities of the A/E consultant and the construction manager, as well as compensation for those services.

If a percent-of-construction-costs method is not used, districts must determine another way of establishing ~~the reasonableness of~~reasonable compensation for design services. Other acceptable methods include comparison with other projects completed by the district, design cost ranges for comparable projects being developed by other districts, or professional judgment. However, with the exception of the ~~most simple~~simplest school capital projects, the detailed-services method is likely to be the most appropriate for the majority of projects. Under this method, the owner, usually through a request for proposals (RFP), identifies the scope of the project along with its anticipated services. The ~~design~~ professional consultant then proposes a set of detailed services by project phase; these are often called "tasks". Each service/task is supported with proposed staffing, the hours for those staff, and the hourly rate. The detailed services method results in a very clear definition of contract scope. In evaluating this type of fee proposal, districts can review: 1) the categories of services needed (e.g., Will the design team need to make public presentations of design iterations?), 2) the level of expertise needed (e.g., Can an engineer-in-training (EIT) really handle all the electrical design or is a senior engineer needed?), and 3) the hours needed to complete the task (e.g., 100 hours for a door schedule at 95% design; doesn't modern design software automate that process?). Review and negotiation of design services at this level of detail is often very helpful for all parties in the resulting contract.

Design costs for basic services should be approximately the same for a similar project anywhere in the state, because the Alaskan cities in which A/E offices are located do not differ markedly in cost of living. Types of services, however, may vary considerably; a $5 million facility constructed in Anchorage could easily cost $10 million if built in Bethel or Barrow. Often this is due to infrastructure elements such as extensive water, wastewater, and electrical power; these systems all require additional professional services for their design. Travel expenses to remote locations also need to be considered, along with the time lost when unplanned site visits become necessary. Fixed costs for site visits need to remain flexible enough to accommodate travel delays and resultant unplanned expenses.

Agreements between the owner and ~~A/E~~ consultant on the basis and amount of compensation, maximum amounts to be paid for reimbursable expenses, and the compensation schedule should be set out clearly in the agreement between the ~~A/E~~ consultant ~~or firm~~ and the district.

DOT&PF's "Professional Services Agreement" in Appendix C: ~~Basis of~~ Compensation contains one format which can be useful to districts in setting out the compensation rates and schedule. A more simplified format which has been used successfully by several districts is included as Appendix ~~B~~ C

of these Guidelines. Districts are able to choose the format that is most useful to them in laying out the terms and limits of compensation.

Contract for Design Services

Preparing a contract for ~~design~~ professional services is a complicated process, but the process can be made easier by utilizing standard contract documents available from one of many different organizations or associations. The comments which follow are not in any order of priority nor do they exhaustively discuss or analyze the various trouble spots which may arise ~~in~~ during development of a contract ~~for design services~~. This document covers a few specific areas and concepts that often appear to be misunderstood.

The contracting process often raises issues and questions ~~upon~~ for which specific legal advice is necessary. These guidelines are not a substitute for such advice but provide information that can enable the district to have an informed discussion with its legal counsel regarding the ~~design~~ professional services contract.

Standard Documents

There are numerous form contract packages in existence which have been developed by various user groups associated with the construction industry. For example, the American Institute of Architects (AIA) publishes forms which are often used by its members and others. The Alaska Department of Transportation and Public Facilities (DOT&PF) has also developed such forms, several of which have been referenced in this document. The Engineers Joint Contract Document Committee (EJCDC) also publishes standard contract documents. Other forms are published by contractor and engineering associations. Some municipalities have their own contract forms. Each form has its own constituency and group of adherents, and ideal circumstance of application.

Architects generally use the AIA contract forms. These have been developed and modified ~~to~~ for changing conditions over many years. The AIA contract documents, from architect services through construction, to project closeout, are fully integrated with construction contract forms. All forms must be approached knowledgeably and employed properly. They can save a great deal of time and expense ~~over trying to start~~compared to starting from scratch. The contract document is extremely important, and the contracting agency should ~~use~~ exercise great care in selecting the standard form. All contracts are not created equal.

All contract form packages may be changed and supplemented. However, any change must be coordinated with construction documents. Some of the following comments provide areas for further consideration. Standard contract documents allow for revision, and each time the documents are used, the district should review provisions of the contract to verify that they apply, or if they should be modified. If any provisions of the design contract are modified, careful consideration should be given to the impact that the change has on the corresponding construction contract. As with any contract, anytime provisions are modified or added, legal counsel should be consulted to determine the effect of the proposed changes.

Document Integration

Whether one of the form contracts is used as a basic document or not, the entire contract document for professional services must ultimately work together as a package. Districts must make sure that any changes incorporated into the form are made consistently throughout. If, for example, it is determined to delete the arbitration clause, all references to such arbitration must be deleted throughout the various contract documents.

~~These *Guidelines*~~ This section focuses only on the design services contract, ultimately there will be a construction contract, insurance documents, etc. The duties, rights, and responsibilities of the A/E consultant - as set out in the design services contract - will have a direct effect on the construction contract. It is very important that both the design contract and construction contract remain consistent.

For this reason, it is not recommended that a district use one form of design services contract and a different form of construction contract. If two "mismatched" contracts (e.g., AIA with DOT&PF contract forms) were used, the provisions of each will have to be carefully reviewed and compared to be certain that all inconsistencies and discrepancies are caught and corrected. Generally, ~~speaking,~~ if a standard design services contract is used, it should be used in the way it was intended - as a package with the construction contract as well.

The Contractual Parties

AS 14.14.060 purports to lay out the relationship between a borough and a borough school district in the design and construction of schools; AS 14.14.065 states the same relationship between a city and a city school district. Although it is not entirely clear, a possible interpretation of that section is that the district is authorized to contract for the professional services needed for school facility design subject to municipal approval. The construction of the project, however, is handled and contracted by the municipality unless there are other specific agreements.

It is important that the contract documents clearly identify the entity responsible for the contract. If the municipality has authorized the school district to act as the contracting agency, a copy of the resolution should be included as an attachment to the contract.

It is also advisable that the same entity act as contracting agency for the complete project; i.e., both the design and construction of the project. If the municipality does not desire to release its obligation to the district as contracting agency for the construction of the project, then it may be preferable that the municipality should act as the contracting agency for the design services as well. Because the design of a project and the subsequent execution of that design are inextricably connected at many points and in many ways, the entity which bears the responsibility and also the liability for the design portion of the project should be a participant during construction to provide continuity and expertise the project.

When boroughs serve as the contract manager and contracting entity, a key role remains for the school district. Under this structure, the district becomes the 'using agency' for which the project is being executed. In this role, the district must work to clearly communicate its needs and goals for

the project and the end-uses for which it must function. In many cases the head of the project team serves in that capacity or as representative of the superintendent of the school district.

Indemnity and Liability

An "indemnity clause", also known as the "hold harmless clause" may be important from the contracting agency's viewpoint. Such a clause obligates the architect to indemnify and hold the owner harmless from certain kinds of claims. For example, if a floor collapses and the contractor were to claim it was inadequately designed, the contracting agency generally wants to assure itself that the architect will be responsible for defending the claim.

The Alaska Statutes, Title 45, impose a limit on the kinds of claims that can be indemnified in a construction contract. An indemnity clause in any construction contract is void if it purports to indemnify the owner against liability for damages arising from the sole negligence or willful misconduct of the owner. The standard AIA form does not include an indemnity clause; however it does ~~however~~ propose liability insurance and arbitration (AS 45.45.900).

A knowledgeable owner or school district may wish to ~~find a~~ place ~~to put~~ blame in case of delay or change order for faulty construction and personal damage. A construction project should be a three-way partnership of owner, architect, and contractor. Architects can no more accept an indemnity clause than can the owner~~, architect,~~ or contractor.

Arbitration and liability insurance do provide for review of liability and security for recompense. Some professional services contracts ~~with architects~~ have been written with a liquidated damage clause to provide that, in the event the architect fails to perform in accordance with the contract time schedule, the architect agrees to pay. The standard AIA form does not include liquidated damages. It does call for arbitration of disputes and liability insurance.

Professional liability insurance is required in Alaska and is carried by most A/E consultants. Policies are written with deductibles. Most claims in Alaska have been settled within the deductible. The cost for this insurance is high and if the owner's request is high, the cost may equal the A/E consultant's expected profit. A reasonable and suggested approach is for the cost to be included in the final fee agreement. The duration of the policy is important. Policies are written on a "claims made" basis, which means that a policy must be in force at the time of claim. If a policy is canceled at completion of a project, the policy will not be in effect if a claim is made later. Districts may wish to consider a requirement that the policy be maintained for a number of years after completion of the project.

The ~~architect~~A/E consultant, as a state-registered professional, accepts liability for injuries to his client or others which are due to his negligence. Most contracts do ask for architects or engineers to indemnify and hold harmless their client for all occurrences. However, construction is fraught with many risks that are outside of the A/E consultant's control.

The AIA document does call for arbitration of claims, disputes, or other matters in question between the parties to the agreement. This is in accordance with the construction industry arbitration rules of the American Arbitration Association.

Post-Occupancy Services

When school construction is complete and the school is occupied, there are other services that may be provided by an A/E consultant. Those services include development of a preventive maintenance plan, development of an operations manual, and completion of a Post-Occupancy Survey.

Development of a preventive maintenance plan is a required deliverable under the department's Project Agreement, and involves developing periodic maintenance schedules for all of the components upgraded or installed as a part of a capital improvement project. The preventative maintenance plan also includes development of a custodial operation plan, energy management plan, maintenance training plan and renewal and replacement schedules.

Development of an operations manual is not required by the department, but is an important document that will provide future users of the facility with a reference document for operation of the building systems.

In some instances, especially in cases where a project will utilize new, innovative or un-tested design strategies, or non-standard space utilization strategies, it is beneficial to return to the facility at least a year after student occupancy and review the facility using a process known as a "Post-Occupancy Survey." A Post-Occupancy Survey provides the district and users of the facility with an opportunity to report on how well the facility is performing. The department has developed a detailed questionnaire that can be used to perform a Post-Occupancy Survey.

Project Budget and Schedule

The district should include provisions in the A/E contract to insure that the A/E consultant is prepared to develop three cost estimates at three separate times during project development.

The department's Project Agreement includes required submittal of three progressive cost estimates during the development of the project documents.

The first cost estimate typically prepared by the A/E consultant is the Schematic Design cost estimate, and is performed at the schematic design phase of the project, or approximately 35% through the design process. This estimate will be based on the schematic design drawings and will provide the district with a cost that includes more detail than the cost estimate a district may have prepared for the submittal of a CIP application. The schematic design cost estimate will assist the district in ~~identifying~~ determining if a project budget is adequate to complete the work identified in the scope of the project. At this ~~state~~ stage of the project, changes to the scope and design are relatively easy for the designer to make, so the district should pay very close attention to this document and make the effort to thoroughly review the cost estimate and scope of the project before authorizing the A/E consultant to proceed to the design development stage.

The Design Development cost estimate is completed at the design development phase of the project, or approximately 65% through the design process. This estimate will provide a further refinement of the cost estimate prepared during the schematic design phase and should give the district an idea of whether the project budget is adequate to complete the entire project scope. Any items identified during the value analysis process should be incorporated into the design documents prior to this submittal. If the design development cost estimate exceeds the project budget, the district will need to work with the A/E consultant to refine the project scope to decrease project costs so that they are within the allocated budget amount.

The Construction Document cost estimate is completed at the end of the design phase, and serves as a final check of the anticipated project cost against the project budget. If the construction cost estimate exceeds the project construction budget, the district will need to review the project and identify components of the project that can be reduced by either utilizing additive alternates or eliminating portions altogether in order to bring the base construction project cost within the construction budget for the project. It may also be necessary to perform additional value analysis to help align the budget with the cost estimate.

The department has developed a tool identified as the *Program Demand Cost Model;* this tool is available on the DEED Facilities web site (https://education.alaska.gov/facilities/publications) and provides districts with the ability to perform basic cost estimating tasks that can be useful for preparation of planning level cost estimates that can be used for the Capital Improvement ~~Program~~ Project Application. The Cost Model should not be used for preparation of schematic level cost estimates.

In addition to tracking the project budget through cost estimates, the district should also consider including provisions in the contract with the A/E consultant that provide for tracking of the project

schedule. The project schedule should be updated periodically throughout the project in order for the district to verify that the project completion date does not slip, or if it does, that the appropriate school district and school board representatives are informed of any changes in the schedule.

APPENDICES

Appendix A - Table of Typical ~~Design~~ Services Provided by Architects and Engineers

As the owner, ~~you will find~~ it will be helpful to review this chart with your A/E consultant to acquaint yourself with the various phases of design and construction and the services available for each.

Project Administration & Management Services	Pre-design Services	Site Development	Design Services
Project Administration	Programming	Site Analysis and Selection	Architectural Design/ Documentation
Disciplines Coordination/ Document Checking	Educational Specifications	Site Development Planning	Structural Design/ Documentation
Agency Consulting/ Review/ Approval	Space Schematics/ Flow Diagrams	Detailed Site Utilization Studies	Mechanical Design/ Documentation
Owner-Supplied Data Coordination	Existing Facilities Surveys	On-Site Utility Studies	Electrical Design/ Documentation
Schedule Development/ Monitoring of the Work	Marking Studies	Off-Site Utility Studies	Civil Design/ Documentation
Preliminary Estimate of Cost of the Work	Economic Feasibility Studies	Environmental Studies and Reports	Landscape Design/ Documentation
Presentation	Project Financing	Zoning Processing Assistance	Interior Design/ Documentation
		Geotechnical Engineering	Special Design/ Documentation
		Site Surveying	Materials Research/ Specifications
			ASHRAE 90.1 Compliance

Bidding or Negotiation Services	Contract Admin. Services	Post-contract Services
Bidding Material	Submittal Services	Maintenance and Operational Programming
Addenda	Observation Services	Startup Assistance
Bidding/Negotiation	Project Representation	Record Drawing
Analysis of Alternates/ Substitutions	Testing & Inspection Administration	Warranty Review
Special Bidding	Commissioning/Report	Post-contract Evaluation
Bid Evaluation	Supplemental Documentation	
Contract Award	Quotation Requests/ Change Orders	Basic Services Contained in AIA's Standard owner architect agreement (B141)
	Contract Cost Accounting	
	Furniture & Equipment Installation Administration	Additional Services contained in expanded list of services ~~(B163)~~
	Interpretations and Decisions	
	Project Closeout	

Refer to AIA Document ~~B163,~~ *Standard Form of Agreement between Owner and Architect for Designated Services* for an expansive listing of available services.

Appendix B - Sample ~~A/E Firm~~Consultant Rating System

Suggested ~~A/E~~Consultant Rating System

Following is a possible rating review for ~~architectural firm~~consultant interviews should be prepared to consider other pertinent areas for discussion.

Overall Experience - (10 points) The entire ~~architectural~~ project experience based upon varied projects involvement.

Specifically Related Experiences - (10 points) ~~That~~ Prior ~~architectural~~ project experience which directly involves construction and design of educational facilities similar to the project.

Capacity - (10 points) The ability of the ~~architectural firm~~consultant to handle the magnitude and complexity of the project.

Qualified Staff - (10 points) The professional experience of the ~~architectural~~ team or individual to be involved in the project.

Ability To Respond (Timeline) - (10 points) The ability to meet deadlines as proposed. The ability to respond to clients' needs.

Design Philosophy - (10 points) The aesthetic and functional accomplishments of design and construction work performed (appearance, function, quality, and technological approach).[3]

Cost - (10 points) The reality of the construction and project budget as indicated in material provided.[4]

Extra Points - (10 points) Additional strengths of ~~architectural~~ consultant firms. Examples include: design problems, limited number of change orders, staying within the architectural contract, communication and work attitude, responsiveness to problem areas, and varied recommendations received from previous clients.[5]

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[3] This "Design Philosophy" item would only apply to a CxA as it relates to the successful operation of facilities commissioned by the CxA.

[4] This "Cost" item does not apply to a CxA.

[5] A CxA could include suggested design modifications that reduced cost or construction process recommendations resulting in more efficient execution of the project.

Appendix B - Sample ~~A/E Firm~~Consultant Rating System

The Scoring Scale

Each area to be rated is to be assigned a numerical value from 0 to 10 by the rater. The following may be referred to as a general guide; Districts may wish to revise points available for each group.

10 - Exceptionally Strong Area
8 - Very Strong Area
5 - Average Strengths
3 - Weak Area
0 - Area not Addressed

Following are some of the items for discussion with the architect.

Overall Experience - (10 points possible)

1. What is the ~~Architect's~~ consultant's entire ~~architectural~~ experience based on various projects involvement? Are these experiences relevant to the current project?

2. Has the ~~Architect~~ consultant demonstrated familiarity with:
   a. Making facilities accessible to physically handicapped?
   b. Fire safety criteria?
   c. Energy conservation appropriate to Alaska?
   d. Design environment for education?
   ~~d.~~ e. Building/classroom safety and security?

3. What does the ~~Architect~~ consultant state regarding the following:~~?~~
   a. Response to owner (cooperation, management plan, timelines, etc.)?
   b. Budget control (design budget, bids, change orders)?
   c. Design success (function, user satisfaction)?
   d. Aesthetic acceptance (owner and community acceptance)?
   e. Maintenance and operation?
   f. Involvement during construction (including construction observation)?

4. What effort has the ~~Architect~~ consultant made in the past to insure that contract documents include inventory lists detailing spare parts, location of suppliers for spare parts, submittal data, required testing, etc.? ~~And how~~How would the ~~architect~~ consultant handle this important service?

Appendix B - Sample ~~A/E Firm~~Consultant Rating System

What experience does the ~~Architect~~ consultant have in managing a project, and is he willing to take on this role from educational specification to move into finished facility? What experience does the consultant have actively cooperatively with the other role?

Specifically Related Experiences - (10 points possible)

1. What school ~~design~~ experience has the ~~Architect~~ consultant had? How closely is it related to this project? Have these closely related jobs been successes?
2. What can the ~~Architect~~ consultant state regarding the following about past related experiences:
    a. Response to owner (cooperation, timelines, management plan, etc.)?
    b. Budget control (design budget, bids, change orders)?
    c. Design success (function, user satisfaction)?
    d. Aesthetic acceptance (owner and community acceptance)?
    e. Maintenance and operation?
    f. Involvement during construction (including construction observation)?
3. Does the ~~Architect~~ consultant have experience working on facilities similar to those contemplated by the District, with specific reference to experience in last ten years?
4. What efforts would the ~~Architect~~ consultant make to insure that contract documents include adequate documentation of materials and systems for operation maintenance and supply?
5. Is the ~~Architect~~ consultant familiar with DEED regulations?

Capacity - (10 points possible)

1. What is the overall ability of the ~~Architect's~~ consultant ~~overall ability~~ to handle the ~~magnitude~~ scope and complexity of the project? How will the ~~architectural~~ design team ~~will~~ be organized and administered? How will the CxA be incorporated?
2. Does the ~~Architect~~ consultant have the office facilities and production capabilities to handle this project?
3. What is the ~~Architect's~~ suggested scope of services of the consultant?
4. What energy conservation measures would the ~~Architect~~ consultant utilize in this design? Detailed operational cost estimates may be required (regarding wind-driven rain, solar advantage, light utilization, heating and air-conditioning systems).
5. Would the ~~Architect and sub-~~consultant~~s~~ team be willing to write a complete maintenance and operations narrative for the District?

6. Will the ~~Architect and sub-~~consultant~~s~~ team assist in a one-year post-occupancy inspection in order to evaluate maintenance and operations?
7. What other information ~~do you feel~~ is important about ~~your firm~~ the consultant that will justify ~~your~~ its selection over other~~s firms~~?

Qualified Staff - (10 points possible)

1. Who are the members of the ~~architectural~~ consultant team to be involved in the project? What is the professional experience of each of the team members? Does the ~~Architect and/or architectural~~ team have backgrounds appropriate for handling the project?

2. What are the names and addresses of the ~~Architect's~~ consultant firm's proposed sub-consultants? Are they "in-house"? How is coordination handled for completion of electrical, mechanical, and structural components?

~~2.~~ 3. What experience ~~have you~~has the District had with the proposed design team? Is there any prior experience between the design team and the CxA?

Ability To Respond (Timeline) - (10 points possible)

1. Does the ~~Architect~~ consultant show a willingness to be sensitive to community needs, and ~~will he~~ welcome involvement of community representatives? Is the ~~Architect~~ consultant willing to work with District personnel in the ongoing process?

2. What schedule and guidelines would the ~~Architect~~ consultant suggest ~~in order~~ to plan and coordinate the design of the facility with community participation and approval?

3. Can the ~~Architect~~ consultant suggest a time schedule indicating when the design, bidding and award, and construction phases, or commissioning could be completed?
   a. What techniques has the ~~Architect~~ consultant employed on past projects to ensure the set time schedule is met?
   b. Does the ~~Architect~~ consultant have the staff and capability to have the construction documents completed along the District's timelines? ~~Will the CxA be available for ongoing Cx during construction?~~ Who will be working on the project? List by discipline and by name.
   c. What is a realistic period of time to have completed plans for actual construction? (~~Give~~ Suggest some timelines.)
   ~~c.~~ d. Will the CxA be available for ongoing Cx during construction?

4. What design and construction problems ~~have you~~has the consultant encountered on similar projects, and how can they be avoided?

5. Could the ~~Architect~~ design or construction management consultant assist the District with the selection of all equipment and furnishings?

6. Would the ~~Architect and sub-~~consultant~~s~~ team be willing to write a complete maintenance and operations narrative for the District? Would the ~~Architect and sub-~~

consultant~~s~~ team be available to perform ~~start up~~commissioning of a new facility in cooperation with the CxA and give complete maintenance instructions?

7. Can the ~~Architect~~ consultant coordinate the design to provide ~~a place~~ for ~~the~~ Works of Art? How could this effort be coordinated with the community?

Appendix B - Sample ~~A/E Firm~~Consultant Rating System

Design Philosophy- (10 points possible)

1. Does the ~~Architect~~ design consultant have the ability to produce a~~n~~ functional and integrated ~~excellent~~ design for the project? (This should be based upon the aesthetic and functional accomplishments of the design and construction work performed ~~.~~ – appearance, function, quality, and technical approach.)
2. What is the ~~Architect's~~ design philosophy of the consultant for this project (including life-cycle costs factors and aesthetic values)?
3. Is the ~~Architect~~ design consultant familiar with the various design standards (~~i.~~e.g., fire, ~~handicapped~~accessibility) and DEED requirements?
4. Can the ~~Architect~~ design consultant coordinate design to make provisions for art works? How could this effort be coordinated with the community?

Cost - (10 points possible)

1. What are the costs per square foot estimated to be for this area for various types and locations of school construction?
2. What is the ~~Architect's~~ basic scope of services anticipated by the consultant? What is the estimated ~~slope~~ scope of reimbursable services?
3. Does the ~~Architect~~ consultant anticipate ~~see~~ any constraints with the budget indicated for the project?

Extra Points - (10 points)

1. Additional strengths of the ~~Architect's firm~~consultant. Examples include: design problems solved, services available during construction, change order experience, staying within the parameters of the ~~architectural~~ contract, communication and work attitudes, responsiveness to problem areas, and various recommendations received from previous clients.

Appendix B - Sample ~~A/E Firm~~Consultant Rating System

PERFORMANCE RATING CHART

~~Architectural Firm~~Consultant	Overall Experience 10 pts	Related Experi-ence~~s~~ 10 pts	Capacity 10 pts	Qualified Staff 10 pts	Ability To Respond 10 pts	Design Philos-ophy 10 pts	Cost 10 pts	Extra Points 10 pts	Total Point Rating

Note: Possible points for each area should be adjusted by district.

Appendix C - Sample Schedule of Compensation

This sample schedule provides one method whereby the fees and expenses for each basic and additional service may be displayed in the agreement for design services. The form is a sample only and would need to be modified to reflect only those services which are to be provided by the ~~architect or architectural firm~~consultant.

BASIC SERVICES

Description of Services	Agreement Reference	Days for Completion	Method of Pay	Compensation	Fees & Expenses
Schematic Design	_____	_____	_____	_____	_____
Value Analysis					
Design Development	_____	_____	_____	_____	_____
Construction Documents	_____	_____	_____	_____	_____
Bid Services	_____	_____	_____	_____	_____
Construction Services	_____	_____	_____	_____	_____
Cx Plan and Execution	_____	_____	_____	_____	_____

In addition to the above, services may be required of the ~~architect~~ A/E consultant or CxA during the following phases of the project:

Pre-design Services	_____	_____	_____	_____	_____
Site Selection	_____	_____	_____	_____	_____
Value Analysis Report	_____	_____	_____	_____	_____
Post-Construction Services	_____	_____	_____	_____	_____
Commissioning Report					

Additional Services (Examples)

Feasibility Study	_____	_____	_____	_____	_____
Energy Audit	_____	_____	_____	_____	_____
Meetings & Presentations	_____	_____	_____	_____	_____

Appendix D - Sample RFP for Construction Manager

[SCHOOL DISTRICT NAME]

[District Logo]

REQUEST FOR PROPOSALS
FOR CONSTRUCTION MANAGEMENT
RELATED SERVICES
[per 4 AAC 31.065]

Project Name: _____
Project #: _____
RFP #: _____
Location: _____

Procurement Agency and Address:
[District]
[Division]
[Address]
City, Alaska 99XXX

Procurement Officer: _____ Date of Issuance:
District Contact: _____ [Month/Date/Year]
Phone: _____
Email: _____

REQUIRED SERVICES: ☐ are described in the attached Statement of Services

The Project cost estimate is: ☐ under $50,000 ☐ $50,000 - $100,000 ☐ $100,000 - $200,000.00 ☐ over $200,000

Note: Offerors shall carefully review this solicitation for defects and questionable or objectionable material. Comments concerning defects and objectionable material must be made in writing and must be received by the purchasing authority before proposal due date. This will allow issuance of any necessary addenda. It will also help prevent the opening of a defective solicitation and exposure of the Offeror's proposal upon which award could not be made. Protests based on any omission, error, or the content of the solicitation will be disallowed if not made in writing before the proposal due date.

PERIOD OF PERFORMANCE: Begin: [Month Year] End: [Month Year]

SUBMITTAL DEADLINE AND LOCATION

DATE: PREVAILING TIME: Fax :
OR Email:

Hand deliver proposal directly to following location, and person, if named; or email, or fax to a number above:
PHYSICAL ADDRESS:
INDIVIDUAL:

Late proposals will not be considered. ***Offerors*** are responsible to assure timely delivery and receipt and ***are encouraged to respond at least four business hours prior to the above deadline.*** Any addendum issued less than 24 hours prior to a Deadline will extend that Deadline by a minimum of an additional 24 hours. The Contracting Agency shall not be responsible for any communication equipment failures or congestion and will not extend the deadline for any proposals not received in their entirety prior to the deadline. Except for hand delivered proposals, confirmation of receipt by telephone or other means four hours or less prior to deadline will ***not*** be provided.

Appendix D - Sample RFP for Construction Manager

1. PROPOSAL FORMAT

The Construction Management firm's proposal shall be provided in the following format in order to provide the information to demonstrate the firm's experience, knowledge personnel and resources to successfully perform the services requested. The required submittals are:

A. Proposal Form (see attached)
B. Cover Letter: Provide a cover letter (not to exceed two pages) introducing your firm, the proposal, and your understanding of the project.
C. Project Team: Provide an overview of the proposed team detailing the professional staff expected to be providing services on the project. Include experience and professional credentials (i.e., CCM, PMP) for each team member. Provide a history of the team's relationship.
D. Project Management Firm Experience / Project Profiles: Provide a maximum of 5 project profiles. Preferred projects presented should demonstrate experience with the following attributes: project delivery methods, school construction, and state funding through AS 14.11.11 or AS 14.11.100. For each project include the client's name, project name, project location, summary of services performed, and construction budget. Provide Owner references for at least three (3) of the projects, including name, title, and phone number.
E. Project Organization: Provide an organizational chart. Identify roles and responsibilities, reporting relationships and use of sub-consultants. Identify whether project management services will be self-performed or utilize sub-consultants.
F. Project Approach: Present your understanding of the Project, its schedule, and the scope of the services required. Include how your firm provides project management services for any or all of the Project's phases (i.e., design, construction, project close-out, etc.).

2. BASIS OF SELECTION

This solicitation does not guarantee that a contract will be awarded. All proposals may be summarily rejected. The intent is to select a Contractor based on the criteria specified as follows:

Criteria

A. Project Team & Staffing: qualifications, education, experience, and references.
B. Experience: experience of the offeror in performing similar services for building projects of similar scope and similar location.
C. Methodology: understanding of the project, the services required, and the soundness of the project approach.
D. Responsiveness: proposal completeness and quality, responsiveness to the detailed services and anticipated schedule.

Scoring

Proposals will be evaluated using the categories and scoring indicated below. The final score will be calculated by computing an average of the total Evaluation Committee's scores.

a. Background (XX Points)
b. Project Team & Staffing (XX Points)
c. Related Experience (XX Points)
d. Overall Project Approach (XX Points)
e. Approach to Schedule and Budget (XX Points)
f. References (XX Points)

3. PRICE AND METHOD OF PAYMENT

A Price Estimate is NOT required with your proposal. The selected Offeror shall submit a Price Estimate within ***three*** business days following a request from the Contracting Agency. A Price Estimate shall include all tasks to perform the contract and be prepared to show hourly rates, anticipated hours, and anticipated staff, by task. Note that a Price Estimate is not a bid. It is a negotiable offer. A Fixed Price contract is desirable; however, a Cost Reimbursement contract may result if a Fixed Price cannot be negotiated.

4. PROJECT INFORMATION AND SCHEDULE

[Enter project description and background]

Schedule

CM Firm contract award	[Date]
Advertise for A/E or CxA RFP	[Date]
A/E or CxA RFPs Due	[Date]
A/E or CxA Contracted	[Date]
Schematic Design Due	[Date]
Design Development*	[Date]
Contract documents	[Date]
Advertise for Bids	[Date]
Award for construction	[Date]
Construction and Cx Completion	[Date]

5. RESPONDENT'S CHECKLIST

Proposals will not be considered if the following information, documents and/or attachments are not completely filled out and submitted with the proposal.

- ☐ Cover sheet, page 1, Proposal Form, must be manually signed.
- ☐ Copy of Alaska Registration or Required Certifications
- ☐ Project References
- ☐ Other

1. ATTACHMENTS

- ☐ Statement of Services
- ☐ Proposal Form
- ☐ [Sample Contract]
- ☐ [General Conditions]
- ☐ [Insurance Requirements]

DEED Project No:
Date Prepared: XX/XX/XXXX

STATEMENT OF SERVICES

[PROJECT NAME]

INDEX

ARTICLE B1
ADMINISTRATIVE REQUIREMENTS

B1.1 General. The Contractor shall provide services as identified and authorized by sequentially numbered Notices-to-Proceed (NTP). The Contractor shall not perform services or incur billable expense except as authorized by an NTP.

B1.2 Definitions.

B1.2.1 "Project Manager", "Construction Manager", "CM", or similar phrases mean the contractor who is a party to this agreement.

B1.2.2 "User Agency" means the District, division, etc., that generated the requirement for which services under this agreement are obtained.

B1.3 Project Staff. All services must be performed by or under the direct supervision of the following individuals (replacement of, or addition to, the Project Staff named below shall be accomplished only by prior written approval from the Contracting Agency):

Name	Project Responsibilities
ENTER NAMES OF CONTRACTOR'S & SUBCONTRACTOR'S KEY STAFF	

B1.4 Professional Registration. Unless otherwise required by Alaska Statute, professional registration is not required to perform these services.

B1.5 Billing Reports. The Contractor shall provide a two-page (typical) report with each monthly billing for months in which services are performed. The report shall specifically describe the services and other items ***for which the billing is submitted***, and shall estimate the percent the services are complete. Any delayed costs from previous billing periods that are included in the current billing must be clearly explained in the report.

B1.6 Correspondence. All correspondence prepared by the Contractor shall bear the Contracting Agency's assigned Project name and numbers (State & Federal).

B1.7 Documents and Reports shall be printed with solid black letters that are double spaced on white, 8.5 inch x 11 inch bond paper. Other size paper may be used for illustrations if they are folded to 8.5 inch x 11-inch size. Original documents and reports shall be printed on one side of the paper only and shall be ready for copying. The use of black and white photographs, color photographs, or multicolored graphics is approved for this project.

Original, camera ready, copies of final documents and reports shall be submitted to the Contracting Agency for a check before printing.

B.1.7.1 Copies. When the Contract calls for multiple copies of documents or reports, the copies shall be printed on both sides of the paper. However, the cover and pages with approved illustrations, multicolored graphics, or photographs shall be printed on one side of the page only. All copies - except for originals - shall be bound.

B1.7.2 Page Numbers. All documents shall be page numbered to allow every major Section, Chapter, Appendix, etc., to begin on a "right hand," odd numbered page.

B1.7.3 Covers. The cover of all documents and reports shall include the following information:

a. Name of document or report.
b. Date.
c. Indicate whether draft or final.
d. Project Name.
e. State and Federal Project Number(s).
f. Prepared for:
g. Prepared by:
h Map and/or picture of project area.

B1.8 Revisions. The Contractor shall modify work products in response to direction from the Contracting Agency. Corrections, adjustments, or modifications necessitated by the review/approval process, but which do not substantially affect the scope, complexity, or character of the services, shall be considered a normal part of the Contractor's services.

B1.8.1 Errors and Omissions. Except as described in this Statement of Services, work products shall be essentially complete when submitted to the Contracting Agency. Work products having significant errors or omissions will not be accepted until such problems are corrected.

B1.8.2 Reviews. Following each review, the Contracting Agency will provide written comments and may hold a meeting to discuss the issues. The Contractor's personnel who are in-responsible-charge for the work products under review shall attend the meeting and they may be asked to interpret and provide explanations of the content.

B1.8.3 Comment Resolution. The Contractor shall provide a written response with subsequent submittals that address all written and oral comments from the Contracting Agency. All changes from previous submittals shall be clearly explained.

B1.9 Reproduction and Distribution. When the contract requires only the original or only one copy of a work product to be delivered, the Contracting Agency will reproduce and distribute any other copies required. Items delivered for reproduction shall be organized and camera ready for copying and not stapled or otherwise bound.

ARTICLE B2
DETAILED SERVICES

B2.1 General Services: This contract is to assist the [Name] School District in meeting its project management and project administration obligations under the Project Agreement with the Department of Education & Early Development for the [Name] project, GR-XX-XXX.

B2.1.1 The CM shall conduct regularly scheduled project status meetings with project stakeholders and provide minutes of those meetings to the parties determined by the District.

B2.1.2 The CM shall monitor the project's budget and provide project controls and reports as required to inform parties as to the requirements that may be needed to keep the project on budget.

B2.1.3 The CM will assist in developing the project schedule and will provide project controls and reports as required to inform parties as to the requirements that may be needed to keep the project on schedule.

B2.1.4 The CM will coordinate as needed with project stakeholders including [list primary known or anticipated stakeholders] to ensure that stakeholders are aware of project needs and proposed solutions, and to receive commitments, as needed, from project stakeholders in support of the project.

B2.1.5 The CM will prepare, on behalf of the District, an RFP for professional services for design and construction administration; will solicit and receive proposals for professional services and will assist the district in evaluating, selecting and entering into contracts with design and engineering professionals and will manage these contracts on behalf of the District.

B2.1.5 The CM shall evaluate, with the District, the need for any other types of contracts and agreements for services and shall solicit, recommend award, and manage all contracts in support of this project.

B2.1.6 The CM shall ensure compliance with DEED requirements for project reporting, project procurements, project submittals, and project payments.

B2.1.7 The CM shall oversee, in conjunction with the districts design contractor, permitting and other regulatory agency requirements.

B2.1.8 The CM shall oversee project close-out requirements with DEED and any other agency having close-out requirements.

B2.1.9 CM shall understand any land and property related aspects of this project including land ownership, leases, right-of-way, right-of-entry, disposal, acquisition, etc. by project stakeholders and shall assist the district in the preparation of documents and instruments as may be needed to clarify land and property issues required by the project scope.

B2.1.10 CM services may require travel, overnight lodging, and other reimbursable expenses.

Notes

1. Castaldi, Basil, *Educational Facilities, Planning, Modernization and Management*, 2nd Edition, Allyn and Bacon, Inc., Boston, Massachusetts, 1982. p. 158.

2. State of Alaska, Department of Transportation and Public Facilities, Appendix B: *Standard Statement of Services for General Architectural and Engineering Design*, Form SSS/GAED, Juneau, Alaska, 1980. pp. 2-4.

3. American Institute of Architects, *Compensation Management System*, Form F819, AIA, Washington, D.C., 1975 and contracts B163 and B141.

4. Council of Educational Facility Planners, Inc, *Planning Guide,* 1991 C.E.F.P.I, Scottsdale, Arizona.

Program Demand Cost Model Update

The proposed changes to update the DEED's Program Demand Cost Model (22nd edition) model school elements will be issued as supplemental material prior to the meeting.

D I S C U S S I O N P A P E R

By: Wayne Norlund
Architectural Assistant

Phone: 907-465-2887

For: Bond Reimbursement & Grant Review Committee

Date: April 3, 2023

File: G:\SF Facilities\BR_GRCom\Papers\ASHRAE 90.1\ASHRAE 8.4.2 BP .docx

Subject: ASHRAE 90.1-2016, Section 8.4.2 Automatic Receptacle Control

Background

ASHRAE Standard 90.1, 2016 Edition was adopted into 4 AAC 31.014 by the State of Alaska in 2020, as the energy efficiency code to be used for new construction, additions, and renovations. The Department has a checklist tool to verify compliance in design and construction.

A committee member requested the opportunity to discuss the portion of the standard relating to plug load controls (ASHRAE 90.1-2016 Section 8.4.2). This particular section has come up a couple of times in the past few years during department project reviews.

Discussion

Please see below the relevant section of the Standard:

8.4.2 Automatic Receptacle Control

The following shall be automatically controlled:

a. At least 50% of all 125 V, 15 and 20 amp receptacles in all private offices, conference rooms, rooms used primarily for printing and/or copying functions, break rooms, classrooms, and individual workstations.
b. At least 25% of *branch circuit* feeders installed for modular furniture not shown on the construction *documents*.

This *control* shall function on

a. a scheduled basis using a time-of-day operated *control device* that turns receptacles off at specific programmed times—an independent program schedule shall be provided for controlled areas of no more than 5000 ft^2 and not more than one *floor* (the occupant shall be able to manually override the *control device* for up to two hours);
b. an *occupant sensor* that shall turn receptacles off within 20 minutes of all occupants leaving a *space*; or
c. an automated signal from another *control* or alarm *system* that shall turn receptacles off within 20 minutes after determining that the area is unoccupied.

All controlled receptacles shall be permanently marked to visually differentiate them from uncontrolled receptacles and are to be uniformly distributed throughout the *space*. Plug-in devices shall not be used to comply with Section 8.4.2.

Exceptions to Section 8.4.2

Receptacles for the following shall not require an *automatic control device*:

1. Receptacles specifically designated for *equipment* requiring continuous operation (24/day, 365 days/year).
2. *Spaces* where an *automatic control* would endanger the safety or security of the room or *building* occupants.

[*Emphasis* in original]

The department has responded to stakeholder queries on this and has enforced this section's requirements during design review with the understanding that the criteria for the code revisions adopted by ASHRAE require there to be a cost efficiency/benefit for each item, which ultimately benefits the building users.

The department developed an ASHRAE 90.1 compliance checklist specific to Alaska schools to aid in design review by designers and DEED. Originally created for the 2010 edition, the source document for the checklist was the "Commercial Building Data Collection Checklist – ANSI/ ASHRAE/ IESNA Standard 90.1-2010" as provided by the United States Department of Energy. The checklist was modified by removing items not commonly associated with educational facilities or not applicable to climate zones 7 & 8. Upon adoption of the 2016 edition, the checklist was conformed to the new edition.

If the committee determines that the plug load requirement should not be enforced as part of the energy efficiency standard for Alaska schools, the department would revise the compliance checklist accordingly.

Recommendation(s)

DEED staff recommends the requirement remain in the checklist as shown in the Standard for projects. The Standard contains sufficient detail and does not require automatic control for all receptacles. Additionally, the criteria for the code revisions adopted by ASHRAE require there to be a cost efficiency benefit.

Department of Education & Early Development
Division of Finance & Support Services/Facilities

Work Topics for the BR & GR Committee

As Of: December 1, 2022

BR&GR 2023 Work Items	Responsibility	Due Date
1. CIP Grant Priority Review – [(b)(1)]		
1.1. FY24 MM & SC Grant Fund Final Lists (4 AAC 31.022(a)(2)(B))	Committee	Apr 2023
1.2. FY25 MM & SC Grant Fund Initial List	Committee	Dec 2023
2. Grant & Debt Reimbursement Project Recommendations – [(b)(2)]		
2.1. Six-year Capital Plan (14.11.013(a)(1); 4 AAC 31.022(2))	Dept	Annually, Nov
3. Construction Standards for Cost-effective Construction – [(b)(3)]		
3.1. Model School Costs (DEED Cost Model)		
3.1.1. Model School Analysis & Updates (Allowable Elements)		Annually, Jan-May
3.1.1.1. Solicit, Award, And Manage Model School Update	Dept	Annually, Jan
3.2. Model School Standards		
3.2.1. State Building Systems Standards		
3.2.1.1. Implement New Standards [See 6.3 Regulations]	Dept	May 22-May 24
3.2.1.2. Review/Approve Plan for Biennial Updates	Committee	Apr 2023
3.3. Design Ratios		
3.3.1. Development of Design Ratios O:EW, V:GSF, V:ES		
3.3.1.1. Amended/Corrected Final Ratios	Dept	Feb 2021
3.3.1.2. Final All Ratios – 1st Review	Committee	Apr 2021
3.3.1.3. Validation Study	Dept	Dec 2021
3.3.1.4. Validation Study Review/Recommendations	Subcommittee	Jan 2022
3.3.1.5. Recommendations Review, Release for Comment	Committee	Jun 2022
3.3.1.6. Evaluate Public Comment, Make Recommendations	Committee	Sep 2022
3.3.1.7. Manage Regulation Development & Implementation	Dept	Sep22 – Apr 23
3.3.2. Develop Test Method for Ratios	Subcommittee	Oct 2023
3.4. School Space Allocation Issues		
3.4.1.Space Guidelines Accuracy		
3.4.1.1. K-12 Allocation Calculation/Formula Issue	Subcommittee	Feb 2022
3.4.1.2. Variance Allowances Review	Subcommittee	Mar 2022
3.4.1.3. Exclusions and GSF Definition Review	Subcommittee	Apr 2022
3.4.1.4. Recommend Accuracy Adjustments	Subcommittee	Jun 2022
3.4.1.5. Review Subcommittee, Make Recommendations to SBOE	Committee	Jun 2022
3.4.2. Space Guidelines Adequacy		
3.4.2.1. GSF Definition Review (incl ASHRAE)	Subcommittee	Apr 2022
3.4.2.2. Electrical/Mechanical (incl ASHRAE) Space	Subcommittee	Sep 2022
3.4.2.3. Storage in Remote Locations	Subcommittee	Oct 2022
3.4.2.4. Space Related to Security	Subcommittee	Nov 2022
3.4.2.5. Community Use & Education Adequacy	Subcommittee	Dec 2022
3.4.2.6. Recommend Adequacy Adjustments	Subcommittee	Dec 2022
3.4.2.7. Review Subcommittee, Make Recommendations to SBOE	Committee	Dec 2022
3.4.3. Regulation Actions	Dept	TBD
4. Prototypical Design Analysis – [(b)(4)]		
No current items.		
5. CIP Grant Application & Ranking – [(b)(5) & (6)]		
5.1. FYXX CIP Briefing – Issues and Clarifications	Dept	Annually, Dec
5.2. FY25 CIP Draft Application & Instructions	Dept	Apr 2023
5.2.1.		
5.3. FY25 CIP Final Application & Instructions	Committee	Apr 2023
5.4. Future CIP Application Issues		
5.4.1. Total Point Balance Review	Committee	Dec 22-Apr 23
5.4.1.1. Initial Briefing Paper to Committee	Dept	Dec 2022
5.4.1.2. Analyze and Make Recommendation to Committee	Dept	Feb 2023

5.4.2. Space Allocation Issues	Dept	TBD
5.4.2.1. Analyze and Make Recommendation to Committee	Dept	TBD
5.4.2.2. Manage Regulation Development and Implementation	Dept	TBD
5.4.3. Electronic Documents Only	Dept	TBD
5.4.3.1. Analyze and Make Recommendation to Committee	Dept	TBD
5.4.3.2. Manage Regulation Development and Implementation	Dept	TBD
5.4.4. Completed Projects Impact on Ranking	Dept	TBD
5.4.4.1. Analyze and Make Recommendation to Committee	Dept	TBD
5.4.4.2. Manage Regulation Development and Implementation	Dept	TBD

6. CIP Approval Process Recommendations – [(b)(7)]

6.1. Publication Updates		
6.1.1. Program Demand Cost Model for Alaskan Schools	Dept	Annually, May
6.1.2. Alaska School Facilities PM Handbook		Dec 17–Dec 21
6.1.2.1. Preventive Maintenance Handbook – Progress	Dept	Dec 2021
6.1.2.2. Preventive Maintenance Handbook – Public Comment	Committee	Apr 2022
6.1.2.3. Preventive Maintenance Handbook – Final	Committee	Sep 2022
6.1.3. Life Cycle Cost Analysis Handbook		
6.1.3.1. Life Cycle Cost Analysis Handbook – Validation	Dept	Feb 2023
6.1.3.2. Life Cycle Cost Analysis Handbook – Initial	Dept	Mar 2023
6.1.3.3. Life Cycle Cost Analysis Handbook – Public Cmt	Committee	Apr 2023
6.1.3.4. Life Cycle Cost Analysis Handbook – Final	Committee	Sep 2023
6.1.4. Professional Services for School Capital Project		
6.1.4.1. Professional Services for School Capital Project– Validation	Dept	Nov 2022
6.1.4.2. Professional Services for School Capital Project – Initial	Dept	Nov 2022
6.1.4.3. Professional Services for School Capital Project – Public Cmt	Committee	Dec 2023
6.1.4.4. Professional Services for School Capital Project – Final	Committee	Apr 2023
6.2. Regulations		
6.2.1. Baseline Design Ratios (see item 3.5.2)	Dept (w/Cmte)	
6.2.1.1. Draft Regulation	Dept (w/Cmte)	TBD
6.2.1.2. SBOE Public Comment on Regulation	Dept	TBD
6.2.1.3. Review Public Comments from SBOE Comment Period	Committee	TBD
6.2.2. Reuse of School Plans and Systems (see item 4.2)	Dept (w/Cmte)	
6.2.2.1. Draft Regulation	Dept (w/Cmte)	TBD
6.2.2.2. SBOE Public Comment on Regulation	Dept	TBD
6.2.2.3. Review Public Comments from SBOE Comment Period	Committee	TBD

7. Energy Efficiency Standards – [(b)(8)]

No current items.

Projected Meeting Dates

February 23, 2023 - Teleconference

- School Space Guidelines Accuracy/Adequacy
- CIP Application Total Points Balance Review
- Professional Services for School Capital Projects (Draft)

April (1 ½ Days) (TBD), 2023 In-Person (Juneau)

- FY25 CIP Application Approval
- Professional Services for School Capital Projects (Final)
- Life Cycle Cost Analysis Handbook (Draft)

Department of Education & Early Development
Division of Finance & Support Services/Facilities

Work Topics for the BR & GR Committee
AS 14.11.014
Updated: 12/1/2022

BR&GR Work Items – Master List	Responsibility	Due Date
1. CIP Grant Priority Review – [(b)(1)]		
1.1. FYXX MM & SC Grant Fund Initial Lists (4 AAC 31.022(a)(2)(B))	Committee	Annually
1.2. FYXX MM & SC Grant Fund Reconsideration Lists	Committee	TBD
1.3. FYXX MM & SC Grant Fund Final Lists	Committee	TBD
2. Grant & Debt Reimbursement Project Recommendations – [(b)(2)]		
2.1. Six-year Capital Plan (14.11.013(a)(3); 4 AAC 31.022(2)(A))	Dept	Annually
2.1.1. Statewide Inventory	Dept	TBD
2.1.2. Statewide Facility Appraisal	Dept	TBD
2.1.3. Statewide Condition Survey	Dept	TBD
2.1.4. Renewal & Replacement Database	Dept	TBD
2.1.5. Presentation by ASD on Facility Condition Indexing	Committee	TBD
2.2. School Capital Funding	Dept (w Cmte)	TBD
2.2.1. Review Process & Funding Streams for Rural & Urban Projects	Dept	TBD
2.3. State's Role in Design & Construction		
2.3.1. In Organized City/Boroughs	Dept	TBD
2.3.2. In REAAs	Dept	TBD
3. Construction Standards for Cost-effective Construction – [(b)(3)]		
3.1. DEED Cost Model	Dept	
3.1.1. Model School Analysis (Allowable Costs)	Committee	Annually, Apr
3.2. Cost Standards	Dept	
3.2.1. Cost/Benefit, Cost Effectiveness Guidelines	Dept	
3.2.2. Life Cycle Cost Guidelines	Dept	
3.3. Commissioning	Committee	2018
3.3.1. Project Categories Requiring Commissioning	Committee	2018
3.3.2. Commissioning Agent Qualifications	Committee	2018
3.3.3. System Requirements for Commissioning	Committee	2018
3.4. Materials/Systems Analysis	Committee	TBD
3.4.1. Model School Building Systems	Dept (w/Cmte)	Annually
3.4.2. School District Building Systems	Dept	TBD
3.5. Design Ratios	Committee	TBD
3.5.1. Building System Ratios ("Micro Ratios") TBD		
3.6. Construction	Committee	TBD
3.6.1. Construction Duration		
3.6.2. Value Analysis		
3.6.3. Component Use and Specifications		
4. Prototypical Design Analysis – [(b)(4)]		
4.1. SB87 – Amendments to 14.11.014(b)(4)	Committee	TBD
5. CIP Grant Application & Ranking – [(b)(5) & (6)]		
5.1. FYXX CIP Draft Application & Instructions (14.11.013)	Dept	Annually
5.2. FYXX CIP Final Application & Instructions	Committee	Annually
5.3. Separate School Construction and Major Maintenance Applications	Committee	

5.4. Separate Grant and Debt Applications	Committee	
5.5. Appendix D Update – Type of Space Added or Improved		
5.5.1. New Classifications & Terminology	Committee	2019
5.6. Review Issues with "Primary Purpose" Designations		
5.6.1. Playgrounds, Parking Lots, etc.		
5.7. Rural Definition For Art (see Instructions, Appx C)	Committee	TBD
5.8. Space Allocation Issues (4 AAC 31.020(c))	Committee	TBD
5.8.1. Career Tech		
5.8.2. Resource Rooms and Special Ed		
5.8.3. Space Related to Security		
5.8.4. Net vs. Gross		
5.8.5. Electrical/Mechanical Space		
5.8.6. Storage in Remote Areas		
5.8.7. "Found Space" (cost-effectiveness test)		
5.8.8. Replacement Schools Clarifications		
5.8.9. Non-school Facilities		
5.8.10. Educational Adequacy/Space Increase		
5.8.11. Community Use Space		
5.8.12. Pre-school		
5.8.13. Out-of-District Enrollment (vocational/charters, etc.)		
5.8.14. Second Attendance Area Schools		
5.8.15. Enrollment Projection Models		
5.8.16. Standard Gym Size		
5.8.17. Projected Unhoused (environmental/erosion timeline)		
5.9.Rater's Guide Matrices		
5.9.1. Emergency Points Matrix	Dept (w/Cmte)	TBD
5.10. Scoring Category & Weighting Factors		
5.10.1. Weighting for Maintenance	Dept (w/Cmte)	TBD
5.10.2. Weighting for Type of Space	Dept (w/Cmte)	TBD
5.10.3. Weighting for Emergency	Dept (w/Cmte)	TBD
5.10.4. Weighting for Life Safety/Code	Dept (w/Cmte)	TBD
5.10.5. Weighting for Average Facility Age	Dept (w/Cmte)	TBD

6. CIP Approval Process Recommendations – [(b)(7)]

6.1. Publication Updates (4 AAC 31.020(a))		
6.1.1. Program Demand Cost Model for Alaskan Schools	Dept	Annually
6.1.2. Capital Project Administration Handbook	Dept	2027
6.1.3. Alaska School Facilities Preventive Maintenance. Handbook	Dept (w Cmte)	2027
6.1.4. Project Delivery Method Handbook	Dept	2027
6.1.5. Cost Format – *EED Standard Construction Cost Estimate*	Dept	2025
6.1.6. Space Guidelines Handbook	Dept (w Cmte)	TBD
6.1.7. Life Cycle Cost Analysis Handbook	Dept (w Cmte)	2023
6.1.8. Swimming Pool Guidelines	Dept (w Cmte)	2024
6.1.9. Guide for School Facility Condition Surveys	Dept (w Cmte)	2025
6.1.10. A Handbook to Writing Educational Specifications	Dept (w Cmte)	2024
6.1.11. Site Selection Criteria and Evaluation Handbook	Dept	2029
6.1.12. Facility Appraisal Guide	Dept	TBD
6.1.13. Guidelines for School Equipment Purchases	Dept (w Cmte)	2026
6.1.14. Professional Services for School Facilities	Dept	2023
6.1.15. School Design & Construction Standards	Dept (w Cmte)	Biennially
6.2. New Publications		
6.2.1. Outdoor Facility Guidelines for Secondary Schools	Dept	TBD
6.2.2. Renewal & Replacement Guideline	Dept	TBD
6.3. Regulations		
6.3.1. CIP "Primary Purpose" (see 5.6 Primary Purpose)	Dept (w Cmte)	TBD

6.4.	Online Application	Dept	TBD
6.5.	Database Review		
6.5.1.	Consolidate Into Single Database	Dept	TBD
6.5.2.	Coordination With Unity Project	Dept	TBD
6.5.3.	ADM By Grade Level	Dept (SERRC)	TBD

7. Energy Efficiency Standards – [(b)(8)]

7.1.	Reporting Requirements	Dept (w Cmte)	TBD
7.2.	Energy Modeling	Dept (w Cmte)	TBD