

## San Diego USD Prop “Z” Charter School Committee

### Preliminary & Advance Planning Grant Review Rubric & Application

- Purpose:** \$330,000 of Prop Z funding has been set aside to fund planning grants. The purpose of the Preliminary grant will be to assist these organizations to undertake feasibility studies in order to be considered for further Prop Z funding in a future application cycle.
- The purpose of Advance planning grant is to further prepare for a Prop Z Project application. See Item #6 for Reporting on deliverables.
- Deadline:** Applications for the Prop Z Planning Grants to be reviewed the first round and begin the prioritization ranking must be received by October 31, 2013. Grants may be awarded at anytime.
- Use of Funds:** Planning grants will not result in a payment to the charter organization. Rather, the charter organization will be required to work with the district to secure in-house or district approved contracted services particular to their needs. Any funds not expended within 1 year of approval may be retained for other charter school facility project needs.
- Criteria:** To be considered for a Planning Grant, an organization (CMO) must have a minimum of one-year experience in operating one or more SDUSD authorized charter schools.

To apply for the Planning Grant (Preliminary or Advance), please provide the following information to the Committee by the deadline above. Please limit your application to no more than three pages. Further information may need to be provided.

**Name of Applicant Organization:**

**Existing SDUSD Charter Operated by Organization:**

**Contact Name:**

**Title:**

**Contact email address:**

**Contact phone:**

**CDS CODE:**

**1. WHAT KIND OF PLANNING PROJECT:**

1. New Construction
2. Health Safety (including ADA)
3. Modernization
4. Purchase or lease project
5. Other

**2. PROJECT**

Please describe for the committee what work you may have already undertaken with regards to your project.

**3. PROPERTY**

Provide the following information regarding the property where the project will be located:

- Location, if one has been decided.
- If a property has been identified:
  - Current ownership of the property
  - Evidence of willingness to sell or long-term lease to the charter or district
  - Physical description of the property (include information on existing structures, location, why this particular property meets your requirements, etc.)
- If not decided, define the property requirements (e.g. acreage, amenities, general location) and what steps have already been taken to identify a suitable property.

#### **4. CHARTER**

Is this project intended to replace existing facilities for an existing school, expand, or replicate?

If yes, please describe why the current facilities are unsuitable or insufficient for your needs.

#### **5. ENROLLMENT**

What is your current enrollment? P-2?

Potential Growth?

Please attached 3-5 year enrollment plan.

#### **6. REPORTING – Set of Deliverables:**

Once funding has been rewarded and project is completed the following items are expected to be reported to Prop Z Charter Committee:

A) Preliminary Planning Grants: Presentation of feasibility study.

1. Feasibility Study - A report that will address the following:

- Options to achieve end goal
- Facility, or concept, can be modify to accomplish end goal
- Site review
- Enrollment capacity
- Program capacity

2. Attach cost – order of magnitude cost estimate

B) Advance Planning Grant: Presentation of the following reports:

1. Pre-Schematics will be completed by:

- a. Hiring an architect
- b. Hiring an Engineering team

Deliverable will include:

1. Facility assessment
2. Schematic drawing (areas of work)
3. General scope of work
4. CEQA process determination (Pre-CEQA – form) - Environmental Impact report
5. Pre-Schematic cost estimate

**Rubric:**

<b>Criterion</b>	<b>Very High</b>	<b>High</b>	<b>Medium</b>	<b>Low</b>	<b>Very Low</b>
<p><b>1a) Need:</b>                      TOTAL of 10 points</p> <p>Need will be measured by ONE of the follow criteria chose the best option:</p> <p><b>Space to expand</b></p>	School/organization currently lacks adequate space for basic functions, space limits enrollment and growth. (10 points)	School/organization currently lacks adequate space for some important functions. (7 points)	School/organization has adequate space for basic functions and most or all other important functions. (5 points)	School/organization has adequate space for basic functions and most or all other important functions. (3 points)	School/organization has adequate space for all basic and important functions. (1 point)
<p><b>1b) Need:</b></p> <p><b>Condition</b></p>	School/organization facilities present imminent health/safety concerns. (10 points)	School/organization facilities are dilapidated and/or present several health/safety concerns (7 points).	School/organization facilities are in adequate condition for basic functions. Minor health/safety concerns (5 points).	School/organization facilities are in fair condition for basic functions. No health/safety concerns. (3 points)	School/organization has quality facility conditions (New building or recently rehab) for all basic and important functions. (1 point)
<p><b>1c) Need:</b></p> <p><b>Facility Cost</b></p> <p>(Please provide Itemization)</p>	School/organization pays; >20% percent of general-purpose revenues for facility cost (10 points)	School/organization pays; >15% percent of general-purpose revenues for facility cost (7 points)	School/organization pays; >10% percent of general-purpose revenues for facility cost (5 points)	School/organization pays; >5% percent of general-purpose revenues for facility cost (3 points)	School/organization pays; >3% percent of general-purpose revenues for facility cost (1 point)

<p><b>2) School strength and track record</b></p>	<p>School/organization is in “good standing” per district oversight staff, audit reports “clean” for prior year, and cash reserves are growing and exceeded 7 percent of prior-year expenditures. Evidence that both board and administrative staff are substantively engaged in facilities planning activities and possess expertise in facilities planning concepts. (10 points)</p>	<p>School/organization is in “good standing” per district oversight staff, audit reports “clean” for prior year, and cash reserves exceeded 5 percent of prior-year expenditures. Evidence that both board and administrative staff are substantively engaged in facilities planning activities. (7 points)</p>	<p>School/organization is in “good standing” per district oversight staff, audit reports “clean” or resolved for prior year, and cash reserves exceeded 3 percent of prior-year expenditures. Evidence that either board or administrative staff is substantively engaged in facilities planning activities. (5 points)</p>	<p>School/organization is in initial 2 years of operation, school is in “good standing” per district oversight staff, audit reports “clean” for prior years, and cash reserves exceeded 3 percent of prior-year expenditures. Little evidence that board and/or staff is engaged in facilities planning activities to-date. (3 points)</p>	<p>School/organization is in initial year of operation, school is not in “good standing” per district oversight staff, “findings” have been reported on audit reports for prior year, and cash reserves do not exceed 3 percent of prior-year expenditures. No evidence that board and/or staff is engaged in facilities planning activities to-date. (zero points)</p>
<p><b>3a) Readiness for advanced planning?</b>  (Prospective property/facility has been identified—degree to which school is ready to engage in advanced facilities planning)</p>	<p>Identified property meets space and configuration needs in current state with little or no alterations. Professional review shows no significant zoning, airport proximity, environmental, building code, or other issues, but additional planning is needed prior to applying for project grant to vet one or more significant areas. (10 points)</p>	<p>Identified property meets space and configuration needs in current state with modest alterations. Preliminary review shows no significant zoning, airport proximity, environmental, or other issues, but additional planning is needed prior to applying for project grant to vet one or more significant areas. (7 points)</p>	<p>Identified property meets gross space needs but may require significant alterations or and/or new construction. Preliminary review shows no significant zoning, airport proximity, environmental, or other issues, but additional planning is needed prior to applying for project grant to multiple more significant areas. (5 points)</p>	<p>Identified property may meet gross space needs but may require significant alterations or and/or new construction. Preliminary review shows no significant zoning, airport proximity, environmental, or other issues, but additional planning is needed prior to applying for project grant to vet multiple significant areas. (2 points)</p>	<p>Identified property may meet gross space needs (or is a vacant lot) but may require significant alterations or and/or new construction. Preliminary review shows no significant zoning, airport proximity, environmental, or other issues, but additional planning is needed prior to applying for project grant to vet multiple significant areas. (zero points)</p>

<p><b>3b) Readiness for early planning.</b></p> <p>(Prospective property/facility has not been identified—degree to which school is ready to engage in early- to mid-stage facilities planning)</p>	<p>No specific property/facility has been identified. School has an up-to-date multi-year strategic plan with detailed facilities needs component and related financial projections. Planning needs are largely limited to technical facilities matters.        (10 points)</p>	<p>No specific property/facility has been identified. School has multi-year strategic plan with detailed facilities needs component and related financial projections. Planning needs are largely limited to minor updates to strategic plan and technical facilities matters.        (7 points)</p>	<p>No specific property/facility has been identified. School’s strategic plans require significant updating. Planning needs include both updates to strategic plan and technical facilities matters.        (5 points)</p>	<p>No specific property/facility has been identified. School has engaged in little or no recent strategic planning. Planning needs include both strategic planning, facilities needs assessment, and technical facilities matters.        (2 points)</p>	<p>No specific property/facility has been identified. School has engaged no recent strategic planning. Planning needs include both strategic planning, facilities needs assessment, and technical facilities matters.        (zero points)</p>
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