

**San Diego USD Prop “Z” Charter School Committee**  
**DRAFT Planning Grant Review Rubric & Application**  
Draft Version 1.0

<b>Criterion</b>	<b>Very High</b>	<b>High</b>	<b>Medium</b>	<b>Low</b>	<b>Very Low</b>
<b>1) Need</b> (school’s relative need for facilities)	School currently lacks adequate space for basic functions, facilities are dilapidated and/or present imminent health/safety concerns, and school must spend >15 percent of general-purpose revenues for lease or debt service (20 points)	School currently lacks adequate space for some important functions, facilities are dilapidated and/or present imminent health/safety concerns, and school must spend >10 percent of general-purpose revenues for lease or debt service (15 points)	School has adequate space for basic functions and most or all other important functions, must spend >5 percent of general-purpose revenues for lease or debt service (5 points)	School has adequate space for basic functions and most or all other important functions, must spend >3 percent of general-purpose revenues for lease or debt service (2 points)	School has adequate space for all basic and important functions, must spend >3 percent of general-purpose revenues for lease or debt service (zero points)
<b>2) School strength and track record</b>	Charter petition has been renewed at least once, school 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	Charter petition has been renewed at least once, school 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	Charter petition has been renewed at least once, school 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	School is in initial charter term, 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. (2 points)	School is in initial charter term, 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. No evidence that board and/or staff is engaged in facilities planning activities to-date. (zero points)

	in facilities planning activities and possess expertise in facilities planning concepts. (10 points)	in facilities planning activities. (7 points)	in facilities planning activities. (5 points)		
<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)	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)	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)	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)	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)	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)
<b>3b) Readiness for early planning.</b> (Prospective property/facility has not been identified—degree to which school is ready to engage in early- to mid-stage facilities planning) FOURTH	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)	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)	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)	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)	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)

### APPLICATION FOR PROP Z PLANNING GRANT

- Purpose:** \$250,000 of Prop Z funding has been set aside to fund planning grants. The purpose of the grants will be to assist these organizations to undertake preliminary design, feasibility, and planning work that is preliminary to consideration for further Prop Z funding in a future application cycle.
- Deadline:** Applications for the Prop Z Planning Grants to be reviewed the first round must be received by September 30, 2013. Grants maybe rewarded 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 by July 31, 2014 will be retained for other charter school facility project needs.
- Criteria:** To be considered for a Planning Grant, an organization must have a minimum of one-year experience in operating one or more SDUSD authorized charter schools.

To apply for the Planning Grant, please provide the following information to the Committee by the deadline above. Please limit your application to no more than three pages.

**Name of Applicant Organization:**

**Existing SDUSD Charter Operated by Organization:**

**Contact Name:**

**Title:**

**Contact email address:**

**Contact phone:**

**CDS CODE:**

**WHAT KIND OF PLANNING PROJECT:**

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

**PROJECT**

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

**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.

**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.

**ENROLLMENT**

What is your current enrollment? P-2?

Potential Growth?

Please attached 3-5 year enrollment plan.