



CALIFORNIA'S
COALITION
for ADEQUATE
SCHOOL HOUSINGSM

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**C.A.S.H. WORKSHOP
Plan Verification Team (PVT)**

Friday, December 11, 2009

9:00 a.m. to 12:30 p.m.

Ontario Airport Marriott
2200 East Holt Boulevard
Ontario, California

SMART PLANNING

What You Should Know to Maximize Funding Opportunities

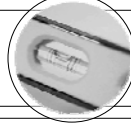
SUSAN RYAN

NTD Architecture

CALIFORNIA'S COALITION *for* ADEQUATE SCHOOL HOUSING

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Handout materials are available online after the workshop. To download the materials, visit www.cashnet.org/meetings and click on the link labeled "Workshop and Conference Handouts."



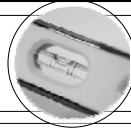
Smart Planning: *What You Should Know to Maximize Funding Opportunities*

Susan Ryan

Educational Facility Planning and
Governmental Relations

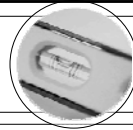
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Smart Planning: Before You Get to PVT Review

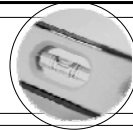
- Working with your architect during Programming to maximize funding opportunities in your design
 - What is your overall master plan for the site?
 - Are you building in phases?
 - Are you putting in all of the Off-site improvements now or later?
 - Will you go after funding now or later?
 - What are the pros and cons of each related to maximizing funding?



Smart Planning: Before You Get to PVT Review

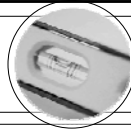
- Teaching Stations
 - What is considered a Teaching Station?
 - How should each space be loaded?
 - How should that be labeled on your plans?

- Ancillary Spaces
 - What is eligible for funding?
 - Special Education Classrooms
 - Therapy Space
 - Rest Room square footage



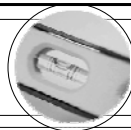
Smart Planning: Before You Get to PVT Review

- Know your eligibility...
 - When does it come and go?
 - Use it or lose it?
 - Plan ahead if you see enrollment trends changing



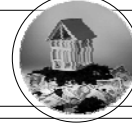
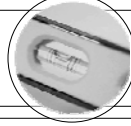
Smart Planning: Before You Get to PVT Review

- Timing is everything
 - Don't miss out on windows of opportunity
 - Don't wait to see how it will work
 - Be at the front of the line
 - How can new programs benefit your project?
- Attitude is everything
 - The program drives the decisions
 - Funding is the double edge sword
 - Build to fund, or fund to build?



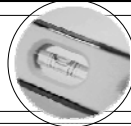
What You Don't Know, That You Don't Know

- If you don't understand the process, hire someone who does
 - This is not a time to be uneducated
 - Your long term loss of funding opportunities can multiply
 - Fear of the unknown
 - Be a player in the process
 - Don't leave money on the table



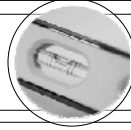
What You Don't Know, That You Don't Know

- The Regulations
 - Do you really know what they say?
 - How are they interpreted?
 - What is the common practice?
 - Has precedent already been set?
- Filling out the SAB 50-04 form
 - Do you know your eligibility?
 - Checking the boxes



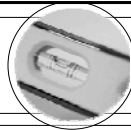
"Coulda", "Woulda", "Shoulda"

- If only....
 - We had known about that before we bought the site....
 - We *could* have planned better...
 - We *would* have done it differently....
 - We *should* have been able to get more money...
- If only....
 - We had known what our long term plan was
 - We *could* have integrated/added/decreased....
 - We *would* have done it this way...
 - We *should* have maximized our opportunities...



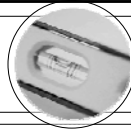
Where is the \$\$\$

- New Construction
 - Fire Code Requirements
 - Multi-Level Construction
 - Project Assistance
 - Replacing Single Story with Multi-Story



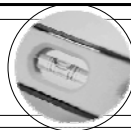
Where is the \$\$\$

- New Construction
 - Site Acquisition
 - What is included in the Appraisal?
 - Highest and Best Use
 - Reimbursement Agreements
 - Finished Site
 - Utilities
 - Curbs, Gutters, Sidewalks
 - Other Off-site Improvements
 - Contaminant Free Parcel
 - DTSC Fees
 - Hazardous Waste Removal



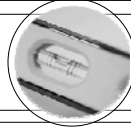
Where is the \$\$\$

- New Construction (continued)
 - Site Development/General Site Development
 - Use of Grants
 - Geographic Location
 - Small Size Project
 - New School Project
 - Alternative Education Facility
 - Labor Compliance
 - Urban Location/Impacted Sites
 - Facility Hardship
 - High Performance Incentive Grant



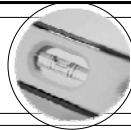
Where is the \$\$\$

- Modernization
 - Fire Code Requirements
 - Fire Detection Systems/Alarms
 - Automatic Sprinklers
 - 50 yr. Old Buildings
 - Geographic Location
 - Small Size Projects
 - Urban Location/Impacted Site
 - Energy Efficiency



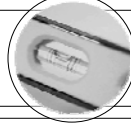
Where is the \$\$\$

- Modernization (continued)
 - Accessibility
 - Elevators
 - Labor Compliance
 - Project Assistance
 - Seismic Rehabilitation
 - High Performance Incentive Grant



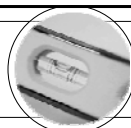
What Do You Do Now?

- Re-asses you current projects
 - Where are you in the planning stage?
 - What are the impacts of doing things differently or making changes?
 - Will the loss of time be worth it?
 - Will the additional costs be worth it?
 - Will the additional funding be worth it?
 - Will your Board/Superintendent/Community support it?



What Do You Do Now?

- Plan wisely for your upcoming and future projects.
 - Where are you in the planning stages?
 - What are the benefits of doing things differently or making changes?
 - Will you save time in the long run?
 - Will there be additional costs?
 - Will there be cost savings?
 - What are the additional funding opportunities you can capture?
 - Will your Board/Superintendent/Community support it?

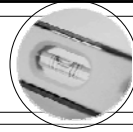


Plan, Plan, Plan...

- Now is the time to plan
 - Don't let missed opportunities pass you by
 - Learn as much as you can
 - Ask questions
 - See what your peers are doing
 - What mistakes can you avoid?
 - Learn from each others successes
 - Don't be complacent



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Thank You!

Questions?

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