



CALIFORNIA'S
COALITION
for ADEQUATE
SCHOOL HOUSINGSM

www.cashnet.org

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

Tuesday, December 8, 2009

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

Doubletree Hotel
2001 Point West Way
Sacramento, California

**HOW MY DISTRICT MAXIMIZED THE PVT REVIEW TO
OPTIMIZE PROJECT FUNDING:**

The Project Team and the Dialogue with the OPSC PVT

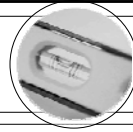
ART HAND

Lodi Unified School District

CALIFORNIA'S COALITION *for* ADEQUATE SCHOOL HOUSING

1130 K Street, Suite 210 • Sacramento, CA 95814 • Phone (916) 448-8577 • Fax (916) 448-7495 • www.cashnet.org

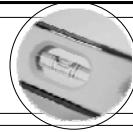
Handout materials are available online after the workshop. To download the materials, visit www.cashnet.org/meetings and click on the link labeled "Workshop and Conference Handouts."



How My School District Maximized the PVT Review to Optimize Project Funding

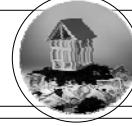
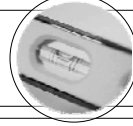
**The Project Team and the
Dialogue with the OPSC PVT**

Art Hand, Lodi USD



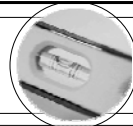
The Project

- Facility Hardship Renovation at Tokay High School
- \$13.1 million in funding requested to repair major mold/dry rot damage to all permanent structures on site
 - 60/40 state/district split
- Construction commenced - 7/07
- Construction completed - 6/08
- SFP funding app submitted - 8/08
 - Work with PVT commenced immediately with submission of funding app
- Unfunded apportionment - 4/09



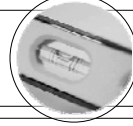
The Team

- Architect/ Engineer
 - Architecnica of Stockton
 - Great familiarity with the SFP process, though this was their first Facility Hardship Project
- SFP Consultant
 - School Facility Consultants of Sacramento assisted with the application filing
 - Involved from project conception
- OPSC
 - Because of the nature of the project, involved from Day 1
- DSA
 - Because of the nature of the project, involved from Day 1
- District Facilities Planning Staff
 - Project Specialist/Construction Manager/ Assistant Superintendent involved in all day-to-day decision making because of project complexities



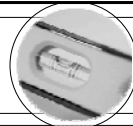
The Purpose

- Identify and complete required construction work as quickly as possible
- Capture project costs so as to minimize the confusion once a funding app was submitted
- Move the application through the review process as quickly as possible to funding



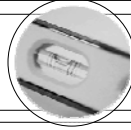
How We Did Our Work

- Architect maintained detailed cost accounting
- DSA concurrence with work as it progressed
- OPSC kept in the loop throughout project
- Voluminous documentation provided to OPSC in support of funding app



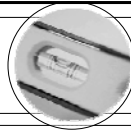
The Results

- Project recommended for full funding (\$7.8 million) through Facility Hardship save for expenses requested for associated temp housing (not an allowable expense under program)
- PVT review was protracted, but ended with a positive outcome for the District



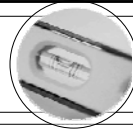
Rules of the Road

A General Primer to Successful
Interaction with the PVT



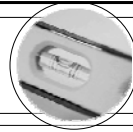
Setting the Stage

- Provide as much background documentation as possible with app submission
- Be mentally prepared to respond to app deficiency letters, as they will come
- Develop a cooperative working arrangement with OPSC/PVT before you go to the well to ask for more \$\$



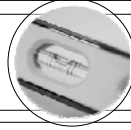
Tricks of the Trade

- Include all eligible costs in app, including “funding bump” items
- Make sure project design consultant knows the SFP process and has worked successfully with PVT in the past
 - Need to speak the same language
 - Cost accounting documentation trail must be thorough
- **Be aware that Saylor's is the Bible**
 - Actual costs vs estimates are great, but still may not carry the day



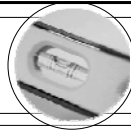
Work Behind the Scenes

- District/Program Consultant makes regular contact with OPSC at app submission and follow-up throughout app review process
- Anticipating/answering OPSC questions on the up-front can save countless time and result in a greater apportionment



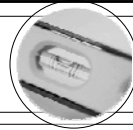
Don't Fear the Reaper

- 15 Day and 4 Day Letters can be your friend
- Opportunity to respond directly to OPSC/PVT concerns
 - Road map for District to maximize grant award
- Take advantage of opportunity by coordinating response with District team prior to providing information to OPSC



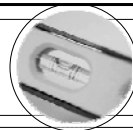
To Meet or Not to Meet

- Once 15 day or 4 day letter is reviewed by District team, decide if it would be best to request a meeting with OPSC/PVT to discuss cost changes and amendments
- Always good to consider, as there is almost always positive change that can be made



Who to take to the Party

- Cast of thousands not necessary
 - One Representative from each part of the project team a good plan (architect/engineer; consultant; district)
- Make sure you bring all needed background documentation based on deficiency letter
- Design professional should be capable of PVT-speak so that these groups can communicate in the best, most effective way possible

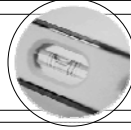


Expect Reality-based Outcomes

- Don't anticipate that your team will carry the day on all issues
- PVT reviewer will be fair, but a stickler with regard to the conformance to School Facility Program guidelines
- **Communication is The Key**
 - The more information that can be provided to PVT the better chance the district has of maximizing its grant award
 - Work cooperatively without arguing, if possible



CALIFORNIA'S
COALITION
for ADEQUATE
SCHOOL HOUSINGSM



*Another Day
Another Dollar
(you hope)*

Look forward to riding off into the sunset knowing you've done your best to maximize the project's funding award