

SBA Policy and Procedures  
**APPENDIX F**

School Building Authority of West Virginia  
**PROCEDURES FOR DEVELOPMENT AND REVIEW OF  
CONSTRUCTION FUND PROJECTS**  
(Needs Funding)  
**APPENDIX F**

The SBA staff will utilize the following approach to review the projects submitted by each county for competitive school construction funding.

Each county in West Virginia who has an approved CEFP is eligible for capital improvement funds from the SBA based on the needs of the facilities in their district. The project, for which SBA school construction funds are being requested, must be part of the approved CEFP to be eligible for funding consideration.

Each county shall work with the SBA staff to evaluate the needs of the facilities as indicated in the CEFP.

Each county is responsible for determining in their facilities plan the specific project(s) for which SBA school construction funds will be requested. This individual project will be fully developed by the county working with the SBA staff, in regard to the issues indicated in Section 1.1 of the SBA Policy and Procedures Handbook and have a SBA School Construction Fund Project Summary Report completed.

Proposals for school construction fund projects must be part of an approved CEFP, and submitted at the request of the Authority based upon the availability of funds for distribution. Provide two (2) hard bound copies and one (1) electronic PDF file.

The Authority will review and evaluate the projects based upon criteria set forth in Section 1.1 of the SBA Policy and Procedures Handbook. A prioritized list of projects to be funded equal to the amount of the funds available during the specific funding cycle will be developed by the Authority.

The Authority reserves the right to request review of any or all projects submitted to them that they feel has special merit or extenuating circumstances.

1. Development of the Competitive School Construction Fund Project.
  - a. Each county shall work with the SBA staff to evaluate the needs of the county's facilities based on the conditions described in the CEFP. Discussions should focus on the projects impact on the county's preventative maintenance plan, as well as, the impact on county's efforts to operate more efficiently.
  - b. The proposed project, whether it is a new facility or an addition/renovation, should focus on improving efficiencies within the

school district and shall be developed with integral involvement of the SBA staff.

- (1) If the proposed project is to be the construction of a new facility, SBA funding will be determined on the SBA funding formula. Should the county desire additional square footage above the SBA funding formula or to utilize property with abnormal site conditions, additional local funds may be needed to complete the desired increase in project scope. Should design professionals and/or cost estimating professionals be needed to assist in determining the additional scope of work or potential additional funds needed to complete the desired project, the SBA staff will assist in the advertisement and hiring process for the necessary services.
- (2) Should the proposed project be an addition, renovations or mechanical/electrical system upgrade to an existing facility, the SBA staff shall assist in developing an understanding of the desired scope of work prior to the involvement of design professionals. Once the scope of work is defined, the SBA staff will assist in the advertisement and hiring process of the appropriate professional services and together the final scope of work will be determined.

c. Once an understanding of the proposed project scope has been developed, the SBA staff will assist with the completion of the required documentation to ensure an accurate representation of the proposed project is submitted for SBA funding consideration.

## 2. Review of the competitive school construction fund projects

- a. The SBA staff will evaluate the school construction fund projects in accordance with WV Code 18-9D-16 as well as the mission and goals of the Authority as in 18-9D-15.
- b. This review will utilize the following criteria to evaluate and make recommendations concerning merit for school construction funding.
  - (1) Health and safety
  - (2) Economies of Scale
  - (3) Travel Time and Demographics
  - (4) Multi-county/Regional Aspects
  - (5) Curriculum Improvement
  - (6) Educational Innovations
  - (7) Adequate Space for Projected Enrollment
  - (8) History of local funding efforts  
(to the extent constitutionally permissible)
  - (9) Effective and Efficient Use of Funding

3. Verification of Evaluations of Existing Facilities – School Construction Fund Projects
  - c. An on-site evaluation report will be prepared by the SBA staff for all school construction fund projects throughout the state as identified by the Authority. This report will:
    - (1) Verify the scope of the project
    - (2) Assess cost estimates of proposed facilities
    - (3) Evaluate the feasibility of the project
    - (4) Consider the option of new vs. renovation
    - (5) Address transportation and demographic issues
  - d. During the on-site review and prior to the Superintendent interview, the SBA staff will assist in developing the presentation to be used in an effort to provide the Authority Members a thorough understanding of the proposed project.
4. The on-site evaluation report will be provided to the Authority for consideration in their deliberation and final selection of projects to be funded from the construction funds account.
5. Administrative Interview

Before the Authority determines the statewide prioritized list, members will identify projects where specific questions or clarifications are needed in order to consider the project for funding. Superintendents and county board presidents will be asked to appear before the Authority to make presentations regarding their individual projects and to answer questions of the Authority members.

Upon a majority affirmative vote of the members present, the interviews may be held in Executive Session in accordance with WV Code 6-9A-4 (9) which provides that such session may be held for: “matters involving or affecting the purchase, sale or lease of property, advance construction planning, the investment of public funds or other matters involving competition which, if made public, might adversely affect the financial or other interest of the state or any political subdivision.”

- a. Purpose of the Interviews
  - (1) To provide an opportunity for the local board of education to express the importance of the project to the school system and its impact on the students who will attend the school;
  - (2) To clarify any issue or question regarding the project;
  - (3) To familiarize the SBA Members with individual projects and provide opportunity for questions prior to funding deliberations.
- b. Interview Format

- (1) A short presentation by the county administration emphasizing both cost savings to be gained as well as educational opportunities to be achieved should the project be funded. A strict limitation of 5 minutes for oral presentations by each county will be enforced by the Authority.
  - (2) Questions will be asked by the SBA Members concerning the project. A 10 minute limitation will be used for this phase of the interview component.
- c. Content of the Superintendent's Comments
  - (1) The presentation should address the specific costs and savings as can best be estimated from the data available to the administration. This should include such items as transportation, personnel, Operations and Maintenance and administrative costs.
  - (2) Projected timelines should be provided on the completion of design, bidding and construction components. Status of the project including architectural designs, site selection, and/or other work that has been completed prior to the interview date should be emphasized.
  - (3) Any handouts and/or photos that will help clearly address the need of this project, its impact on the quality of education, and the efficiency of administering the county school system may be utilized during the interview process.
  - (4) Be prepared to work with the SBA to develop a project budget for the construction of the proposed facility during this session.
6. After these steps are completed, the Authority will have gathered and compiled sufficient data to make judgmental decisions as to which projects will be funded through school construction fund grants.
7. Prior to final action on approving projects for funding, the Authority shall submit a certified list of the projects to the Joint Committee of Government and Finance.