Presentation to the
West Virginia Association of School Administrators
Investing in West Virginia’s Future
Thursday, June 21, 2018
sba.wv.gov
# SBA Staff

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>David L. Roach</td>
<td>Executive Director</td>
</tr>
<tr>
<td>Tamela Brewer</td>
<td>Executive Assistant</td>
</tr>
<tr>
<td>Ben Ashley</td>
<td>Director of Architectural Services</td>
</tr>
<tr>
<td>Mike Hall</td>
<td>Assistant Director of Architectural Services</td>
</tr>
<tr>
<td>Joyce VanGilder</td>
<td>Assistant Director of Architectural Services</td>
</tr>
<tr>
<td>Dana Womack</td>
<td>Assistant Director of Architectural Services</td>
</tr>
<tr>
<td>Angie Bradley</td>
<td>Coordinator of Architectural Services</td>
</tr>
<tr>
<td>Garry Stewart / Sue Chapman</td>
<td>Director of Finance</td>
</tr>
<tr>
<td>Stella Gill</td>
<td>Director of Administration</td>
</tr>
<tr>
<td>Lisa Wilkinson</td>
<td>Senior Financial Assistant</td>
</tr>
</tbody>
</table>
Partnerships
Welcome
This site has been created to provide technical information regarding guidelines and procedures that help our educators, architects, and contractors navigate through the various phases of SBA projects. Read a welcome message from Mr. David L. Roach, SBA Executive Director.

Project Spotlight
Project Photo Galleries
Check out our photos and follow us on Flickr and Instagram!

Press Releases
See More
School Building Authority of West Virginia
County Assignments
SBA Staff – County Representatives

Mike Hall
Michael.R.Hall@wv.gov

Joyce VanGilder
Joyce.A.VanGilder@wv.gov

Dana Womack
Dana.E.Womack@wv.gov

Call Us:  (304) 558-2541
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2</td>
<td>Begin Working with SBA Staff</td>
</tr>
<tr>
<td>September 7</td>
<td>Due Date – Project Submission to SBA</td>
</tr>
<tr>
<td>October 29 &amp; 30</td>
<td>Superintendent Interviews</td>
</tr>
<tr>
<td>December 10</td>
<td>SBA Meeting – NEEDs Funding</td>
</tr>
</tbody>
</table>
Project Development Process

Q: How much will the SBA have for project awards in December 2018?

A: $50,000,000 Annual Allocation

$10,000,000 Multi-Year Commitments from Prior Funding Cycle

= $40,000,000 Available in December (Approximately)
SBA “NEEDs” Project Timeline

**Project Development**
- Summer Months
- Prior to Sept.

**NEEDs Interviews & Funding Award**

**Design & Bidding Phases**
- 9-12 Months

**Closeout**
- 1 Month

- **SBA Submission & Staff Review**
  - Sept. 7

- **Educational Planning & Programming**
  - Jan. – Mar.

- **Construction**
  - 14-21 Months
Project Development Process
Project Development Process

❖ Identify County Needs – Look at County Operations:
  ❖ Evaluate Goals of the CEFP
  ❖ Examine Educational Plan & Course Offerings
  ❖ Review Staffing, Operation, Maintenance, Energy Costs
  ❖ Confirm Past & Projected Enrollments, Attendance Areas
  ❖ Note Fire Marshal & BRIM Citations

❖ Identify *Deficiencies & Areas for Improvement*
Project Development Process

❖ Consider when Submitting:
  ❖ Impact on curriculum delivery & your educational plan
  ❖ Selecting projects with a single focus
  ❖ Gaining united support from your Local Board
  ❖ The funding limits of the SBA
  ❖ The maximum local funding available
Project Development Process

❖ Work with your SBA Staff Representative
  ❖ Consider possible options early in the process

❖ Project must be in your Comprehensive Educational Facilities Plan.
  ❖ Amendment will be required if the project is not in your CEFP

❖ Projects should address as many of the evaluation criteria as possible.
Project Development Process

❖ Innovations in Education

❖ The design for the new facility is curriculum driven

❖ If innovative curriculum is desired...

❖ Exceeds Current Policy 6200

❖ Exceeds SBA Funding Formula

❖ Get prior approval from the WVBE

❖ Additional SBA funds may be available for your project
Developing the Project Submission
Developing the Project Submission

- Effective & Efficient Use of Funds
- Health & Safety
- Curriculum & Instruction
- Adequate Space for Project Enrollment
- Economies of Scale
- Travel Time and Demographics
- Multi-County/Regional Aspects
- Educational Innovations
- History of the county’s effort to support their plan with local bonds or levies.
Developing the Project Submission

❖ Discuss the Project(s) Scope and Budget with:
  ❖ Your SBA representative
  ❖ Your Architect and/or Educational Planner

❖ Establish project financing – The Budget is Critical
Developing the Project Submission

❖ Complete Grant Application
  SBA Form 120

❖ Due September 7

❖ Send to Angie Bradley
  Angela.L.Bradley@wv.gov
Acquiring Professional Services
Acquiring Professional Services

- During Project Development, You may Hire a Consultant
- Subject to the WV Code 5-G Process
  - Architects & Engineers (A/E)
  - Construction Managers (CMa) – *if necessary*
  - Consultants not under A/E umbrella
- Not Subject to the WV Code 5-G Process
  - Educational Planner / Curriculum Developer
  - Clerk-of-the-Works – *if no CMa*
Acquiring Professional Services

❖ WV Code 5-G Process - Work with SBA Staff

1. Counties edit prepared SBA Statement of Qualifications template
2. Interested firms contact County, County sends template
3. Firms Submit SOQ packet & performance data (apples to apples comp.)
4. County evaluates SOQ packets & “shortlists” a minimum of 3 firms
5. County interviews shortlisted firms presenting SOQ data
6. County evaluates & scores based on qualifications, selects most qualified
7. County negotiates scope of service and price with most qualified firm
8. Contracts signed must be in accordance with SBA Policy
Acquiring Professional Services

❖ Hire a Clerk-of-the-Works

1. Advertisement in Newspaper
2. Evaluate & Interview based on Experience & Knowledge of Requirements
3. Candidates must agree to perform duties as described in SBA Policy
4. Negotiate Fee & Sign Contract
5. Clerk must be present during site & construction work
6. Clerk must submit Observation Reports
Acquiring Professional Services

sba.wv.gov

“How Do I...” Section
Securing Funding
Securing Funding

❖ SBA Representative will help you prepare for your Interview

❖ Interview with Authority Members – Oct 29 or 30
  ❖ Presentation and Q & A
  ❖ What will the Authority ask?

❖ Post-interview follow-up assistance

❖ SBA Staff provides recommendations to the Authority regarding projects that best meet the funding criteria (9 Points of the Law)
Post-Funding Partnership
Post-Funding Partnership

❖ Educational Programming - County Driven
   ❖ With Educational Planner and/or Architect
   ❖ SBA can Help!

❖ Creation of Educational Specification (Ed. Spec.)
   ❖ Specifically, how do you intend to use this new space?
   ❖ Specifically, what do we tell the Architect to design?
Post-Funding Partnership

❖ Design Phase Submissions & Meetings – 9-12 Months
  ❖ SBA Reviews all design phases

❖ Bidding & Construction – 14-21 Months
  ❖ Coordinate all Bid Dates with Angie Bradley (304) 558-2541

❖ Submit Payment / Finance Requisitions by the 5th of Each Month
  ❖ SBA will release funds on the 15th of Each Month

❖ Your SBA Representative will be with you throughout the entire process
Questions & Input from You
Thank You!

Ben Ashley, MBA, AAIA
Director of Architectural Services
(304) 558-2541
Benjamin.S.Ashley@wv.gov