



School Building Authority  
OF WEST VIRGINIA

Presentation to the  
**West Virginia Association of School Administrators**  
Investing in West Virginia's Future

Thursday, June 21, 2018

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[sba.wv.gov](http://sba.wv.gov)

# **SBA Staff**

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**David L. Roach**

Executive Director

**Tamela Brewer**

Executive Assistant

**Ben Ashley**

Director of Architectural Services

**Mike Hall**

Assistant Director of Architectural Services

**Joyce VanGilder**

Assistant Director of Architectural Services

**Dana Womack**

Assistant Director of Architectural Services

**Angie Bradley**

Coordinator of Architectural Services

**Garry Stewart / Sue Chapman**

Director of Finance

**Stella Gill**

Director of Administration

**Lisa Wilkinson**

Senior Financial Assistant

# Partnerships

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## 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](#)

## How Do I ...

- [Submit a Project for Funding Consideration?](#)
- [File a CEFP Annual Update?](#)
- [Apply for a CEFP Amendment?](#)
- [Hire a Consultant? - A/E, CA, CM, Clerk](#)

[See More](#)

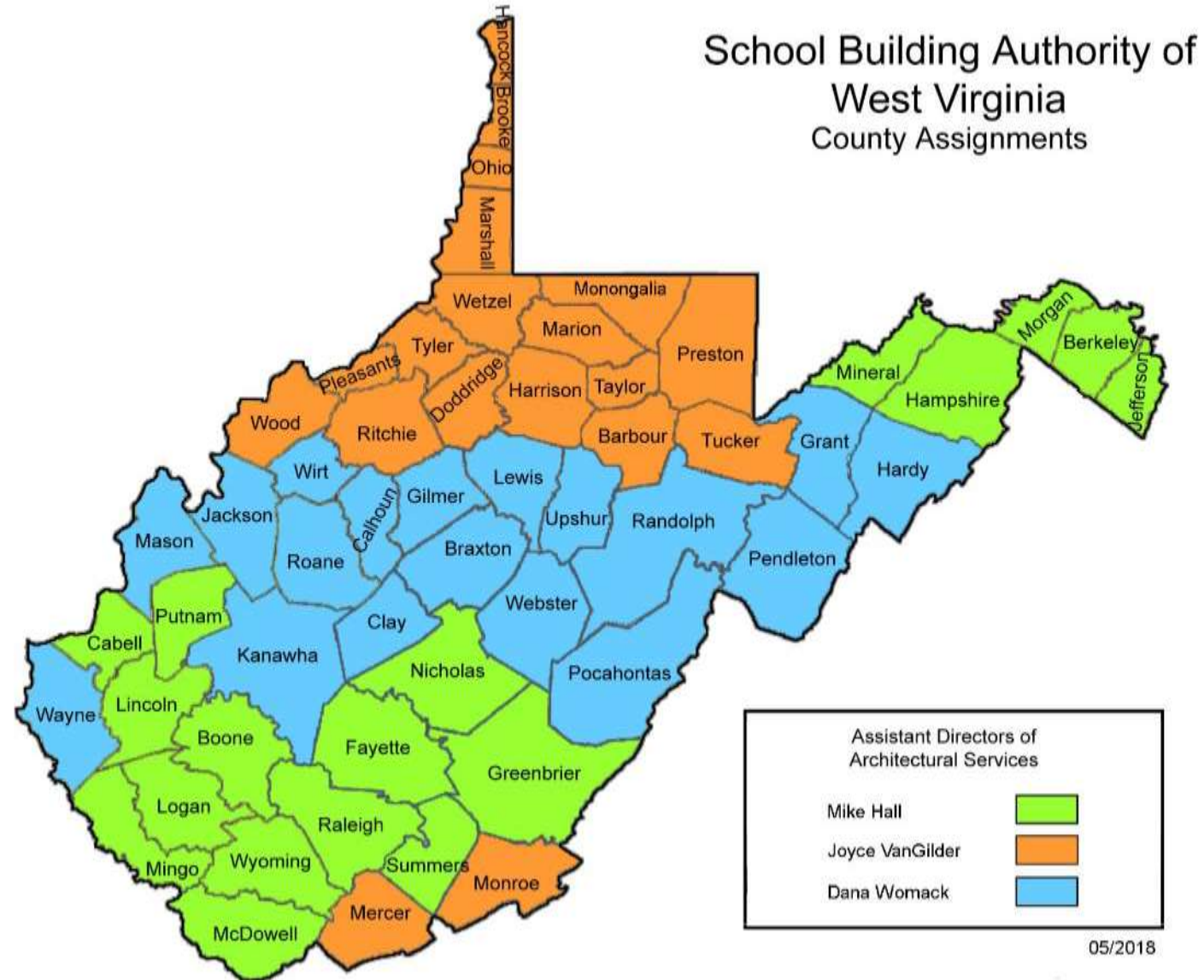
## Resources

- [Funding Allowance Information](#)
- [Bidding Information - Dates & Forms](#)
- [Requisition Information](#)
- [Safe School Design Guidelines](#)

[See More](#)



# SBA Staff – Architectural Services



# **SBA Staff – County Representatives**

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**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**

## Schedule for NEEDs Projects - 2018

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July 2	Begin Working with SBA Staff
September 7	Due Date – Project Submission to SBA
October 29 & 30	Superintendent Interviews
December 10	SBA Meeting – NEEDs Funding

# Project Development Process

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

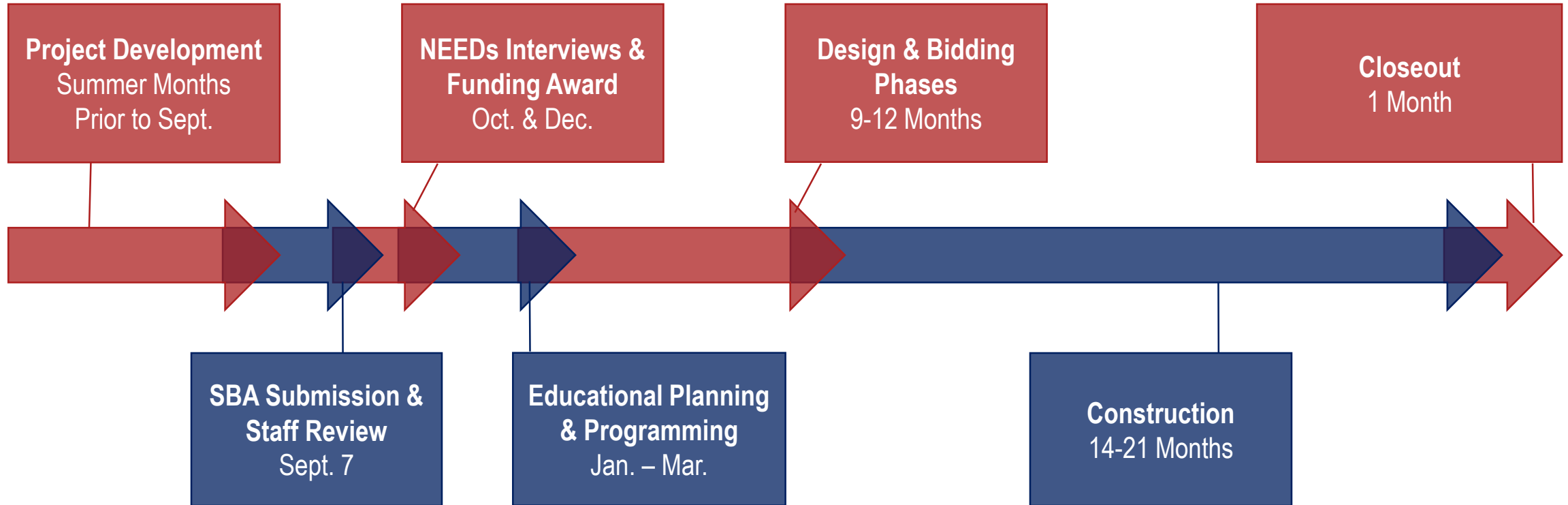
**A:**

+ \$50,000,000	Annual Allocation
<u>- \$10,000,000</u>	Multi-Year Commitments from Prior Funding Cycle
= \$40,000,000	Available in December (Approximately)



# SBA “NEEDs” Project Timeline

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# Project Development Process



# Project Development Process

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- ❖ Identify County Needs – Look at County Operations:
  - ❖ Evaluate Goals of the CEFPP
  - ❖ 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

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- ❖ 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

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- ❖ 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 CEF
- ❖ Projects should address as many of the evaluation criteria as possible.

# Project Development Process

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- ❖ 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

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- ❖ 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

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- ❖ 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

NEEDS

School Building Authority of West Virginia  
CONSTRUCTION FUND PROJECT "NEEDS"  
EXECUTIVE SUMMARY  
SBA FORM 120

PROJECT \_\_\_\_\_  
COUNTY \_\_\_\_\_ PROJECT COST \$ \_\_\_\_\_

<u>IMPLEMENTING TOTAL CEFP</u>		<u>FUNDING SOURCE - THIS PROJECT</u>	
SBA NEEDS \$	_____	SBA	\$ _____
SBA MIP	\$ _____		
LOCAL	\$ _____	LOCAL	\$ _____
FEDERAL	\$ _____	FEDERAL	\$ _____
OTHER	\$ _____	OTHER	\$ _____
TOTAL	\$ _____	TOTAL	\$ _____

Bonding Capacity \$ \_\_\_\_\_ Available Bonding Capacity \$ \_\_\_\_\_  
Excess Levy Capacity \$ \_\_\_\_\_ Remaining Levy Capacity \$ \_\_\_\_\_

If you have an excess levy:  
What percentage are you currently collecting? \_\_\_\_\_ %  
What amount of the excess levy is dedicated to capital improvements annually? \$ \_\_\_\_\_  
What is the expiration date of your levy? \_\_\_\_\_

**PROJECT DESCRIPTION:**

\_\_\_\_\_

**PROJECT STATUS**

Site Selected Yes \_\_\_\_\_ No \_\_\_\_\_ New Site \_\_\_\_\_  
Geotechnical Yes \_\_\_\_\_ No \_\_\_\_\_  
Existing Board Owned Property Yes \_\_\_\_\_ No \_\_\_\_\_  
Survey Performed \_\_\_\_\_  
Programming/Preliminary Design Completed - Describe:  
\_\_\_\_\_

**SCHOOL CLOSURE STATUS**

School Closure Required Yes \_\_\_\_\_ No \_\_\_\_\_  
County Hearing Done Yes \_\_\_\_\_ No \_\_\_\_\_  
County BOE Approved Yes \_\_\_\_\_ No \_\_\_\_\_  
WV BOE Approved Yes \_\_\_\_\_ No \_\_\_\_\_

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# Acquiring Professional Services



# Acquiring Professional Services

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- ❖ 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

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## ❖ 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

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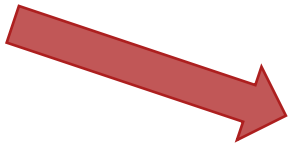
## ❖ Hire a Clerk-of-the-Works

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



Search SBA

SBA School Building Authority OF WEST VIRGINIA

About Us Grant Awards SBA Policy Agenda Contact Us

MIP Funding June 18  
Major Improvement Projects will be awarded 6/18/18

**How Do I ...**

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**Press Releases**

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Flickr Instagram

# Securing Funding





# Securing Funding

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- ❖ 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

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- ❖ 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

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- ❖ 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 5<sup>th</sup> of Each Month
  - ❖ SBA will release funds on the 15<sup>th</sup> of Each Month
- ❖ Your SBA Representative will be with you throughout the entire process

# Questions & Input from You

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School Building Authority  
OF WEST VIRGINIA

# Thank You!

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**Ben Ashley, MBA, AAIA**

**Director of Architectural Services**

**(304) 558-2541**

**Benjamin.S.Ashley@wv.gov**



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