



Implementation of a statewide strategic sequencing plan advances projects from the Statewide Prioritization that are:

- ✓ Of high educational priority
- ✓ Of efficient construction factors
- ✓ Poised to proceed to next development stage
- ✓ In final validation stages to proceed
- ✓ Supportive of Standardization

Utilizing this framework identifies the following Portfolio for 2011 advancement:

- 10 Projects to advance into a Model Design Procurement, Pre-Development or Construction in 2011 to address educational priority needs in Districts
  - Elizabeth - Academic Magnet High School
  - Long Branch - Catrambone Elementary School (Elberon)
  - Bridgeton - Cherry Street Elementary School
  - Jersey City - PS 20 Elementary School
  - Jersey City - Elementary School 3
  - New Brunswick - A. Chester Redshaw Elementary School
  - Newark - Oliver Street Elementary School
  - Paterson - Marshall & Hazel Elementary School
  - Paterson - PS Number 16 Elementary School
  - West New York - Harry L. Bain Elementary School
- Identification and Advancement of Alternative Delivery Methods
- Site Visit Program to Investigate Conditions & Validate Needs
- Completion of the current Emergent Projects and identification of future projects (allocation of \$100 million to fund future emergent projects)
- Complete Active Construction Projects in SDA Districts
  - Camden - Morgan Village M.S.
  - Elizabeth - Number 21, Victor Mravlag E.S.
  - Passaic City - New ES at Henry St.
  - Pemberton Township - New Early Childhood Center
  - Union City - New ES - Columbus Replacement
  - West New York - Number 3 E.S.
- Complete SDA managed projects in the Regular Operating Districts
  - Egg Harbor Twp. - Egg Harbor Twp. H.S.
- Administer the Grants Program for Regular Operating Districts (1,155 grants)

Prepared by the New Jersey Schools Development Authority

# SDA Capital Program Report

SDA Capital Program

Section 1: The Process

Project Identification & Evaluative Criteria

# WHY REVIEW NOW?

- Districts requests for substitutions – impacting 15% of 2008 Capital Plan projects
- The Office of Legislative Services State Auditor findings in June 2010 recommending that the SDA review the 2008 Capital Plan to evaluate the list of 27 projects not previously ranked and remove the requirement that each district receive at least one project.
- Statutory Requirement of periodic review
- Inefficient spending and lack of progress toward implementation of 2008 Capital Plan

# Framework for the Review

- The formulation of a statewide strategic capital plan is rooted in legislation

*P.L.2007, c.137 (C.52:18A-235 et al. “(SDA) shall establish a Statewide strategic plan to be used in the sequencing of SDA district school facilities projects based upon the projects’ educational priority rankings and issues which impact the development authority’s ability to complete the projects including, but not limited to, the construction schedule and other appropriate factors.”*

## Statutory Principles:

- *Statewide educational priority ranking*
- *Statewide strategic plan*
- *Sequencing of projects*
- *Revision of plan at least once every five years*

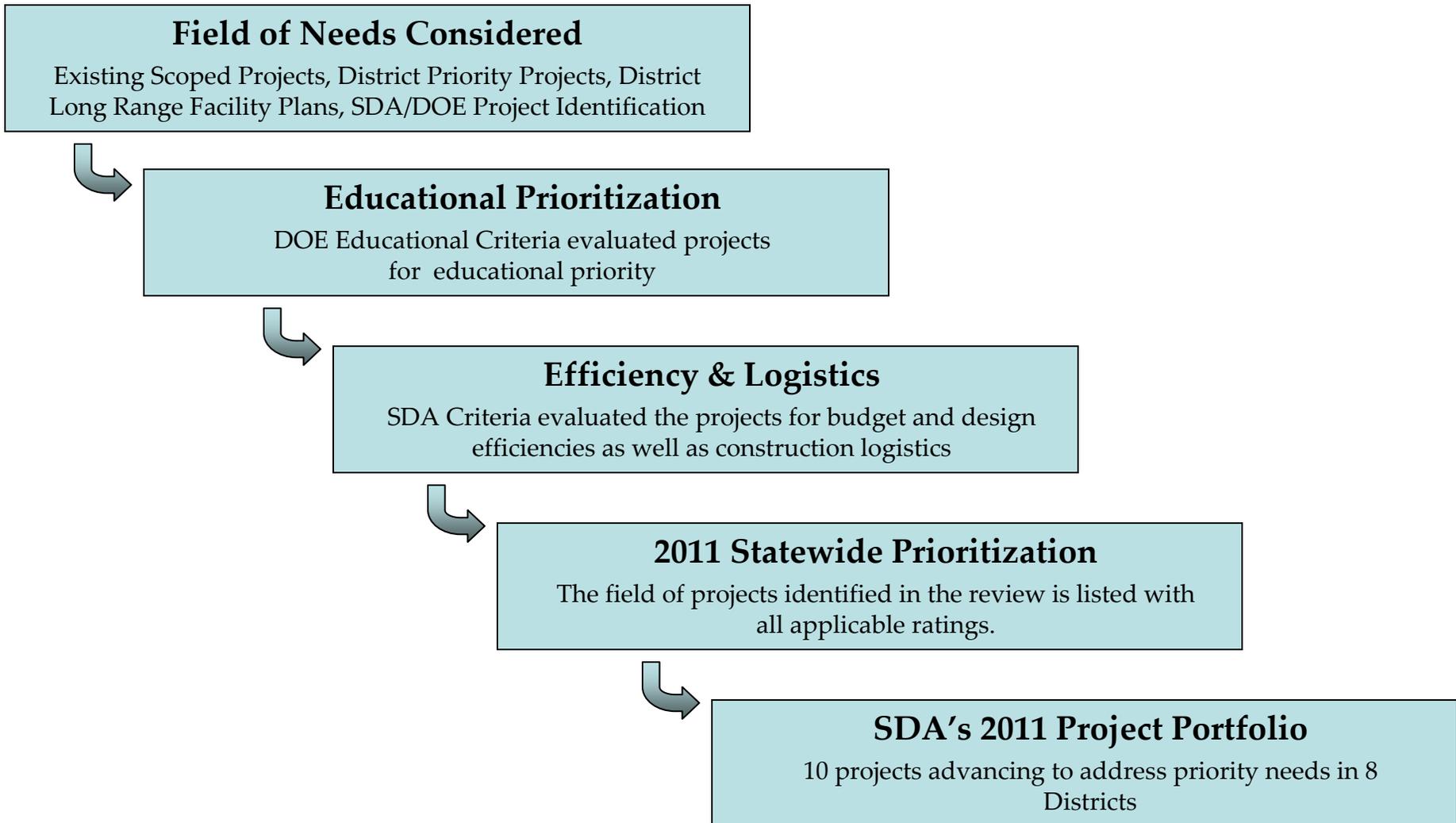
# THE PROCESS

In June 2010 the Capital Plan Review Team was formed via an Interagency Working Group with the charge to conduct a thorough review of the 2008 Capital Plan and present recommendations for a reformulated program. Staff members from the Department of Education (DOE) and the Schools Development Authority (SDA) worked together to:

- Create prioritization criteria that address the State Auditor’s findings and reflect both current educational priorities and factors relating to the most efficient use of public funds
- Communicate with the Districts and cultivate information on facilities conditions
- Analyze and assess projects, as appropriate, in the Districts Long Range Facilities Plan (LRFP)

Potential projects were scored in accordance with the DOE educational rating criteria and then evaluated for efficient construction and cost factors. These factors, combined with the districts’ identified priority rankings make up the 2011 Statewide Prioritization.

# SDA Capital Program The Process



# 2008 : 2011

## A Side-by-Side of the Rating Criteria

### 2008 Criteria

### 2011 Criteria

	Ranking Category (25 Points Total)	% of Points		Ranking Category (18 Points Total)	% of Points
DOE	District-wide Overcrowding (5pts)	20%	DOE	District-wide Overcrowding (6pts)	33%
	Preschool (4pts)	16%		FES Compliance (5pts)	28%
	Temporary & Annex Buildings (4pts)	16%		General Building Conditions (4pts)	22%
	FES Compliance (4pts)	16%		Efficiency (3pts)	17%
	Building Age (4pts)	16%		<i>Range of points awarded: 2-16</i>	
	Misc. Building Considerations (2pts)	8%			
	LRFP Completion (2pts)	8%			
SDA	Ranking Category No Points Awarded; The evaluation was based on programmatic/policy considerations		SDA	Ranking Category (10 Points Total)	
	Complete the 27 previously deferred projects (not subjected to DOE Evaluation)	N/A		Efficient Response to Educational Need (3pts)	30%
	Complete district identified priority projects with investments exceeding \$3M.	N/A		Efficient Use of Public Funds (3pts)	30%
	All districts to have at least one project.	N/A		Construction Schedule Factors (4pts)	40%
	No district to have more than four projects unless sunk costs of additional projects exceed \$3M.	N/A		<i>Range of points awarded: 0-8.5</i>	

# SDA Capital Program

## Section 2: Results of the Review & Reassessment

# Authorized SDA District Funding *(dollars in billions)*

*As of October 31, 2010*

Authorized Funding for SDA Districts:	\$ 9.006
SDA Related Expenses to date:	(\$ 5.744)
Ongoing SDA Funding Obligations & Reserves	(\$ 0.996)*
<b>Funding Remaining for New Projects</b>	<b>\$ 2.266</b>

- The funding calculations for remaining funding is cumulative based on all funding allocations for SDA district construction since program inception and exclusive of funding for the Regular Operating Districts.
- *\*Includes costs to complete active construction projects and ongoing obligations including administrative expenses for a period of 5 years.*

# SDA 2011 Statewide Prioritization (1 / 4)

District	School Name	School Type	Grade Alignment	FES Capacity	Project Type	District Rank	DOE Inter District Ed. Priority Score	SDA Criteria Points Total
Asbury Park	Asbury Park HS	HS	9-12	520	Addition/Renovation	2	6	4
Asbury Park	Bangs Avenue E.S. (Barack Obama)	ES	PK-5	521	New Construction	1	2	6
Bridgeton	Cherry Street E.S.	ES	K-8	591	New Construction	1	13	7.5
Bridgeton	GO Foster ECC	ECC	PK	420	Addition/Renovation	2	11	4.5
Bridgeton	Indian Avenue ES	ES	K-8	591	New Construction	3	11	5
Bridgeton	Broad Street ES	ES	K-8	934	Addition/Renovation	4	10	5
Bridgeton	Buckshutem Road ES	ES	K-8	537	Addition/Renovation	LRFP	6	4.5
Burlington City	Boudinot Area ECC	ECC	PK	180	New Construction	1	3	7
Burlington City	Captain James Lawrence	ES	K-2	175	Addition/Renovation	3	2	4
Burlington City	Samuel Smith	ES	PK-2	268	Addition/Renovation	2	1	5
Camden	Lanning Square E.S.	ES	PK-8	615	New Construction	1	5	6.5
Camden	Camden H.S.	HS	9-12	1,244	New Construction	2	4	4
Camden	Washington ES Replacement School	ES	PK-8	615	New Construction	4	4	2
Camden	Pyne Poynt Family School	ES	PK-8	615	Addition/Renovation	3	3	6
East Orange	East Orange Campus HS	HS	10-12	1,665	Addition/Renovation	LRFP	5	2
East Orange	George Washington Carver	ES	PK-5	541	New Construction	1	5	6
East Orange	Johnnie Cochran ES	ES	PK-5	466	Addition/Renovation	LRFP	2	4.5
Elizabeth	Academic Magnet HS	HS	9-12	1,091	New Construction	1	14	7
Elizabeth	PS 32	ES	PK-8	710	New Construction	LRFP	12	2
Elizabeth	New PS 22 William F Halloran	ES	PK-8	725	New Construction	LRFP	10	3.5
Elizabeth	PS 18 Morris	ES	PK-8	705	New Construction	LRFP	10	3.5
Elizabeth	PS 19 Wilson	ES	PK-8	727	New Construction	LRFP	9	3.5
Elizabeth	Visual/Performing Arts HS	HS	9-12	1,071	New Construction	LRFP	9	1
Elizabeth	PS 12 (Elmora)	ES	PK-8	705	New Construction	LRFP	7	3.5
Elizabeth	PS 6 L'ouverture /Lafayette	ES	PK-8	742	Addition/Renovation	LRFP	6	4.5
Elizabeth	Vocational HS	HS	9-12	900	New Construction	LRFP	4	1.5
Garfield	Garfield HS	HS	9-12	1,333	Addition/Renovation	3	11	2
Garfield	James Madison School #10	ES	K-5	275	New Construction	1	11	7.5

Note: LRFP identifies projects selected from the District Long Range Facilities Plan.

# SDA 2011 Statewide Prioritization (2 / 4)

District	School Name	School Type	Grade Alignment	FES Capacity	Project Type	District Rank	DOE Inter District Ed. Priority Score	SDA Criteria Points Total
Garfield	Woodrow Wilson Replacement School No. 5	ES	K-5	282	New Construction	2	9	4.5
Garfield	Abraham Lincoln	ES	K-5	294	New Construction	LRFP	6	4
Gloucester City	Middle School - New	MS	4-8	811	New Construction	1	8	3.5
Gloucester City	Cold Springs	ES	PK-3	1,067	Addition/Renovation	LRFP	3	4
Harrison	HS conversion to MS	MS	5-8	622	Addition/Renovation	1	8	6
Harrison	Harrison Intermediate	ES	4-5	305	New Construction	2	5	4.5
Hoboken	Thomas G. Connors	ES	PK-4	351	Addition/Renovation	1	10	4
Hoboken	Joseph Brandt	ES	PK-8	450	Addition/Renovation	2	9	4.5
Irvington	Irvington HS	HS	9-12	1,512	Addition/Renovation	2	5	2.5
Irvington	Madison Avenue ES	ES	PK-5	581	Addition/Renovation	1	5	5.5
Jersey City	ECC 13	ECC	PK	324	New Construction	2	14	5
Jersey City	ECC 14	ECC	PK	324	New Construction	3	14	5.5
Jersey City	ES3/ECC 03	ES	PK-5	814	New Construction	4	12	4.5
Jersey City	Dickinson 9th Grade Academy	HS	9	653	New Construction	LRFP	10	2
Jersey City	P.S. 20	ES	K-5	628	New Construction	1	7	4
Jersey City	PS 24 Charles Watters	ES	K-5	716	Addition/Renovation	LRFP	7	4.5
Jersey City	PS 29	ES	K-5	350	New Construction	LRFP	6	2.5
Jersey City	PS 31	ES	K-5	350	Addition/Renovation	LRFP	6	5
Jersey City	PS 33	ES	K-5	350	New Construction	LRFP	6	2.5
Keansburg	New ECC PK-2 (Caruso)	ES	PK-2	813	New Construction	2	15	7.5
Keansburg	Lorraine Place ES	ES	3-5	424	New Construction	1	11	6.5
Keansburg	Keansburg HS	HS	9-12	538	Addition/Renovation	LRFP	2	3.5
Long Branch	George L. Catrambone ES (Elberon)	ES	PK-5	817	New Construction	1	11	8.5
Long Branch	Lenna Conrow	ES	PK-5	890	Addition/Renovation	LRFP	4	4
Millville	New high school	HS	9-12	2,028	New Construction	1	12	1.5
Millville	Bacon	ES	K-5	494	New Construction	LRFP	4	3
New Brunswick	A. Chester Redshaw E.S.	ES	1-5	670	New Construction	1	15	7
New Brunswick	K Center	Primary	PK-K	331	New Construction	2	12	3

Note: LRFP identifies projects selected from the District Long Range Facilities Plan.

# SDA 2011 Statewide Prioritization (3 / 4)

District	School Name	School Type	Grade Alignment	FES Capacity	Project Type	District Rank	DOE Inter District Ed. Priority Score	SDA Criteria Points Total
New Brunswick	Paul Robeson Community E.S.	ES	1-5	599	Addition/Renovation	3	11	7.5
New Brunswick	Lincoln Elementary	ES	1-5	678	New Construction	4	9	4
New Brunswick	K Center 2	ECC	K	181	New Construction	LRFP	5	3.5
Newark	South Street	ES	PK-2	502	New Construction	2	13	4
Newark	Oliver Street	ES	3-8	868	New Construction	1	11	6
Newark	Ridge Street	ES	PK-4	600	Addition/Renovation	6	8	5.5
Newark	West Side	HS	9-12	1,479	New Construction	3	8	3
Newark	Branch Brook	ES	PK-8	436	New Construction	7	7	2.5
Newark	Harold Wilson	ES	PK-8	825	New Construction	5	7	3.5
Orange	Orange HS	HS	9-12	1,048	Addition/Renovation	LRFP	13	2.5
Orange	Cleveland Street ES	ES	PK-8	492	Addition/Renovation	1	6	4
Passaic	Dayton Avenue MS	MS	6-8	1,091	New Construction	3	15	4.5
Passaic	New ECC & Board Offices @ Leonard Pl.(Henry St)	ECC	PK	294	New Construction	4	15	5.5
Passaic	New ECC @ Dayton Avenue Site	Primary	PK-K	256	New Construction	2	14	4.5
Passaic	Dayton Avenue ES	ES	1-5	787	New Construction	1	13	4
Passaic	Passaic HS	HS	9-12	3,371	New Construction	LRFP	10	2
Passaic	Thomas Jefferson (PS 1)	ES	PK-5	683	Addition/Renovation	LRFP	8	4.5
Passaic	Roosevelt (PS 10)	ES	PK-5	709	New Construction	LRFP	7	4
Passaic	Lincoln Middle School	MS	6-8	1,065	Addition/Renovation	LRFP	6	4
Paterson	New ES at Marshall & Hazel	ES	K-8	650	New Construction	1	14	7
Paterson	Number 25 E.S.	ES	K-8	703	Addition/Renovation	3	14	6
Paterson	PS # 16 ES	ES	PK-8	651	New Construction	2	11	3.5
Paterson	#3 ES	ES	PK-8	651	New Construction	4	10	3
Paterson	PS 20	ES	PK-8	584	Addition/Renovation	LRFP	10	5
Paterson	New ES at Don Bosco	ES	PK-8	630	New Construction	LRFP	9	3
Paterson	New Engineering/Technology HS	HS	9-12	889	New Construction	5	7	1.5
Paterson	PS 6A	ES	PK-5	705	New Construction	LRFP	7	2
Paterson	New Health/Medical Science HS (HARP)	HS	9-12	564	New Construction	LRFP	5	2

Note: LRFP identifies projects selected from the District Long Range Facilities Plan.

# SDA 2011 Statewide Prioritization (4 / 4)

District	School Name	School Type	Grade Alignment	FES Capacity	Project Type	District Rank	DOE Inter District Ed. Priority Score	SDA Criteria Points Total
Pemberton Twp.	Addition/Renovation at Denbo	ES	PK-5	728	Addition/Renovation	1	6	6
Pemberton Twp.	Emmons	ES	K-5	325	Addition/Renovation	LRFP	5	5
Perth Amboy	High School	HS	9	2,400	Addition/Renovation	1	15	5
Perth Amboy	New Middle School	MS	6-8	1,106	Addition/Renovation	LRFP	14	1.5
Perth Amboy	Seaman Avenue	ES	K-5	707	New Construction	2	14	3.5
Phillipsburg	New Phillipsburg HS	HS	9-12	1,846	New Construction	1	16	6.5
Phillipsburg	Andover-Morris	ES	1-2	176	Addition/Renovation	LRFP	4	5.5
Plainfield	Hubbard	ES	PK-8	549	Addition/Renovation	LRFP	5	4.5
Plainfield	Cook E.S.	ES	K-8	399	Addition/Renovation	1	4	6.5
Pleasantville	New ECC	Primary	PK-K	858	New Construction	1	9	3.5
Pleasantville	North Main	ES	1-5	187	New Construction	LRFP	1	3
Pleasantville	Decatur Alternative HS	TBD	TBD	TBD	TBD	2	0	0
Salem City	Middle School	MS	4-8	361	New Construction	2	6	4
Salem City	John Fenwick ES	ES	PK-4	610	New Construction	1	4	5.5
Trenton	New Early Childhood Center	ECC	PK	294	New Construction	1	8	8
Trenton	Roebing School	ES	PK-8	1,183	New Construction	2	6	3
Trenton	Trenton Central H.S.	HS	9-12	1,843	New Construction	3	4	3.5
Union City	Jefferson	ES	K-5	717	New Construction	LRFP	14	2.5
Union City	Gilmore	ES	K-5	503	New Construction	LRFP	10	3.5
Union City	Robert Waters	ES	K-5	515	Addition/Renovation	LRFP	9	4.5
Union City	Union Hill MS	MS	6-9	624	Addition/Renovation	1	6	4.5
Vineland	Landis MS	MS	6-8	643	Addition/Renovation	LRFP	5	4.5
Vineland	Vineland Middle School #2	MS	6-8	558	New Construction	1	7	6.5
West New York	Memorial H.S.	HS	9-12	1,859	Addition/Renovation	1	16	6
West New York	Harry L. Bain ES (PS 6)	ES	PK-6	736	New Construction	2	7	4.5
West New York	PS 5	ES	PK-5	677	New Construction	3	6	4

Note: LRFP identifies projects selected from the District Long Range Facilities Plan.

# District Summary: Historical Distribution since inception

District	Health and Safety/ Grants		Completed Capital Projects		Active Capital Projects		Subtotal	
	No. of Projects	Contract Value	No. of Projects	Contract Value	No. of Projects	Project Budget	No. of Projects	Contract Value
1 Asbury Park	5	\$4.5	2	\$22.2	0	\$0.0	7	\$26.8
2 Bridgeton	10	\$15.2	2	\$19.8	0	\$0.0	12	\$35.0
3 Burlington City	5	\$9.5	3	\$95.0	0	\$0.0	8	\$104.5
4 Camden City	46	\$32.3	4	\$191.6	1	\$40.1	51	\$264.0
5 East Orange	16	\$16.0	7	\$252.6	0	\$0.0	23	\$268.6
6 Elizabeth	23	\$36.7	11	\$292.2	1	\$40.3	35	\$369.1
7 Garfield	12	\$3.5	2	\$65.5	0	\$0.0	14	\$69.0
8 Gloucester City	7	\$8.8	2	\$44.2	0	\$0.0	9	\$53.0
9 Harrison	3	\$2.5	2	\$83.0	0	\$0.0	5	\$85.5
10 Hoboken	7	\$30.5	1	\$10.7	0	\$0.0	8	\$41.2
11 Irvington	23	\$24.4	4	\$76.1	0	\$0.0	27	\$100.5
12 Jersey City	36	\$71.1	16	\$203.6	0	\$0.0	52	\$274.7
13 Keansburg	7	\$5.8	0	\$0.0	0	\$0.0	7	\$5.8
14 Long Branch	9	\$16.4	4	\$199.1	0	\$0.0	13	\$215.5
15 Millville	11	\$18.5	2	\$34.5	0	\$0.0	13	\$53.0
16 Neptune	9	\$2.0	9	\$245.8	0	\$0.0	18	\$247.7
17 New Brunswick	13	\$3.3	3	\$222.1	0	\$0.0	16	\$225.4
18 Newark	93	\$159.2	10	\$367.3	0	\$0.0	103	\$526.5
19 Orange	11	\$15.5	3	\$108.1	0	\$0.0	14	\$123.6
20 Passaic City	12	\$45.0	4	\$93.3	1	\$45.5	17	\$183.8
21 Paterson	44	\$157.2	6	\$135.8	0	\$0.0	50	\$293.1
22 Pemberton Twp.	19	\$19.3	0	\$0.0	1	\$29.7	20	\$49.0
23 Perth Amboy	6	\$11.7	5	\$77.3	0	\$0.0	11	\$89.0
24 Phillipsburg	7	\$11.5	2	\$43.7	0	\$0.0	9	\$55.2
25 Plainfield	3	\$2.7	4	\$73.7	0	\$0.0	7	\$76.3
26 Pleasantville	5	\$5.3	0	\$0.0	0	\$0.0	5	\$5.3
27 Salem City	8	\$3.2	0	\$0.0	0	\$0.0	8	\$3.2
28 Trenton	19	\$24.5	8	\$186.9	0	\$0.0	27	\$211.3
29 Union City	18	\$6.3	4	\$226.5	1	\$46.2	23	\$279.0
30 Vineland City	13	\$15.1	6	\$126.3	0	\$0.0	19	\$141.4
31 West New York	8	\$14.3	3	\$104.1	1	\$62.8	12	\$181.2
<b>Total</b>	<b>508</b>	<b>\$791.8</b>	<b>129</b>	<b>\$3,601.0</b>	<b>6</b>	<b>\$264.5</b>	<b>643</b>	<b>\$4,657.2</b>

# SDA Capital Program

## Section 3:

# Implementation Approach

# Next Steps for Implementation

The SDA will implement a statewide strategic sequencing plan that advances projects from the Statewide Prioritization that are:

- Of high educational priority (DOE Rating)
- Of efficient construction factors (SDA Rating)
- Poised to proceed to next appropriate development stage (planning and/or design status)
- In final validation stages to proceed
  - » Review of Site & Environmental Factors
  - » Constructability Review
  - » Review of Project Budget & Schedule
  - » Review of Value Engineering
- Supportive of standardization (inclusive of a cost benefit analysis of redesign).

This strategic framework supports the development of design and constructability standards that are recognized to ensure quality and consistency of systems and materials; ease of operations and maintenance; and appropriate and cost-effective design.

The Authority will evaluate projects in accordance with this framework to identify an annual portfolio for design and construction advancement.

Further the Authority will undertake an annual determination of project capacity and continue its pursuit of alternate delivery approaches such as design build.

The SDA will meet with local district and elected officials to conduct a thorough review prior to advancing a procurement for a project.

# Implementation

## • Plans to Achieve Standardization

The SDA will pursue design standardization through a phased approach that will lead to design replication on multiple projects. The benefits of a phased approach include:

- coordination with sister state agencies on the development of programmatic standards,
- the establishment of internal standards,
- application of those standards to individual projects, while
- allowing for the advancement of appropriate projects.

In 2011, the SDA plans to pursue standardization through three phases:

Phase I: Evaluate the 2011 Statewide Prioritization to identify model school types that lend themselves to greatest number of projects  
(i.e. Elementary School, K-8 for 600-700 students)

Phase II: Consider procurement for a “Kit of Parts” Prototype Design for a model school type

Phase III: Advance principles of standardization in all projects commencing construction in 2011

- » Potential design reuse: classrooms, labs, auditoria etc.
- » Identification of standard systems & materials
- » Standardized space specifications / model room layouts

- **2011 Selection Process**

A comprehensive review of the existing designs of projects included in the 2011 Statewide Prioritization revealed two projects that are supportive of the principles of standardization and are in final validation stages for advancement into construction in 2011:

- Elizabeth - Academic Magnet High School
- Long Branch - Catrambone Elementary School (Elberon)

A comprehensive review of the 2011 Statewide Prioritization further revealed several projects that are appropriate candidates for pursuit of standardization application in 2011:

- Bridgeton – Cherry Street Elementary School
- Jersey City – PS 20 Elementary School
- Jersey City – Elementary School 3
- New Brunswick – A. Chester Redshaw Elementary School
- Newark – Oliver Street Elementary School
- Paterson – Marshall & Hazel Elementary School
- Paterson – PS Number 16 Elementary School
- West New York – Harry L. Bain Elementary School

# Implementation

## SDA's 2011 Project Portfolio:

- 10 Projects to advance into a Model Design Procurement, Pre-Development or Construction in 2011 to address educational priority needs in Districts.
- Identification and Advancement of Alternative Delivery Methods
- Site Visit Program to Investigate Conditions & Validate Needs
- Completion of the current Emergent Projects and identification of future projects (allocation of \$100 million to fund future emergent projects)
- Complete Active Construction Projects in SDA Districts
- Pursue Project Close-Out for 94 completed capital projects
- Administer the Grants Program for Regular Operating Districts (1,155 grants) and complete SDA managed projects in the Regular Operating Districts
- Environmental and Errors & Omissions Cost Recovery Pursuit



# **Educational Prioritization of School Facilities Projects**

FOR SDA 2008 CAPITAL PLAN REASSESSMENT

Prepared by the New Jersey Department of Education, Office of School Facilities

## Inter-District Educational Rating Criteria

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In accordance with N.J.S.A. 18A-7G-5m, the following describes the educational rating criteria used by the New Jersey Department of Education to prioritize projects funded in the New Jersey Schools Development Authority's (SDA) 2008 Capital Plan or proposed in district Long Range Facilities Plans. The purpose of the Department's review is to ensure that funded projects are responsive to current educational priorities and are an appropriate use of available funding. Project ratings are based on information developed in the "Educational Facilities Needs Assessment" for each district. Non-educational issues, such as current project status, funds expended, project costs, land acquisition needs, and logistical and construction considerations, are being considered separately by the SDA. The findings of the Department's educational assessment and the SDA analysis will be jointly considered in the final prioritization and recommendations.

The proposed methodology for the educational ranking of projects is similar to that utilized for the prior prioritization:

- A rating "point system" is applied to each project based on specific criteria. Projects with a higher number of total points are considered the most educationally needed.
- The rating criteria are designed to be as objective as possible and utilize readily available information. Existing rather than projected enrollments are used to assess overcrowding. Educational adequacy is measured by compliance with the Facilities Efficiency Standards (FES). The building condition assessment is primarily based on age and completed renovations.
- The rating criteria highlights the most deficient conditions since each project included in the analysis addresses facilities needs worthy of consideration. Therefore, a low score for a project should not be interpreted as indicating that the project is not needed. Rather, it indicates that higher scoring projects address more severely deficient conditions.
- Overcrowding remains the most weighted criteria.

Major changes to the previous educational prioritization criteria are as follows:

- All potential projects included in a district's approved LRFP that are consistent with the findings of the district's Educational Facilities Needs Assessment are considered rather than just those identified as priorities by the school districts or included in the SDA's Capital Plan.
- No additional consideration is given to specific school types or grade levels for overcrowding. Therefore, unlike the previous prioritization, an early childhood center or elementary school does not receive more rating points than a high school, for example, if equally overcrowded.
- District school buildings are assessed for general condition that includes building age, prior renovations, and FES compliance rather than just building age as in the prior assessment.
- The number of district students accommodated in appropriate, FES compliant buildings is used to assess the extent of district needs rather than LRFP completion.
- Criteria concerning the efficient use of available buildings and capacity have been added.
- The use of temporary classroom units (TCUs) and annex buildings are no longer considered separately since their use does not necessarily imply that a district is overcrowded or has inadequate facilities. Instead, their use is considered within the other rating categories.

## OVERVIEW OF RATING CRITERIA

A comparison between the rating categories and total available “rating points” used for the 2008 Capital Plan and those proposed for the reassessment is provided below, followed by detailed descriptions of the proposed criteria.

2008 Capital Plan Prioritization		2010 Capital Plan Reassessment	
Ranking Category (25 points maximum)	Percentage of Maximum Points	Ranking Category (18 points maximum)	Percentage of Maximum Points
Overcrowding (5 pts. max.)	20%	Overcrowding (6 pts. max.)	33%
Preschool (4 pts. max.)	16%	FES Compliance (5 pts. max.)	28%
Temporary and Annex Buildings (4 pts. max.)	16%	School Building Quality (4 pts. max.)	22%
Building Age (4 pts. max.)	16%	Efficiency/Misc. (3 pts. max.)	17%
Misc. Building Considerations (2 pts. max.)	8%		
LRFP Completion (2 pts. max.)	8%		

### District-Wide Overcrowding

(6 potential points; 33% of total potential points)

Existing overcrowding is assessed on a district-wide basis with the capacities of all district schools serving the same grades as the proposed project added together and compared to current enrollments. The criteria highlight the most severe cases of overcrowding in which every seat in every school is utilized, regardless of operational impediments such as school sending areas and bussing that may hinder full capacity utilization.

School capacities are based on the Facilities Efficiency Standards (FES) capacity calculation methodology for grades PK-5 and the “District Practices” capacity calculation methodology for grades 6-12. The FES capacity calculation methodology only includes district-owned preschool, kindergarten, general, and self-contained special education classrooms in the capacity calculations. This methodology is appropriate for elementary schools since instruction is non-departmentalized or “homeroom” based. District practices capacity allows select specialized classrooms, such as science labs, to be added to the capacity calculations for middle and high schools. Since each district has discretion in assigning capacity to specialized classrooms in its LRFP, the Department reviewed and recalculated capacity as needed to provide consistency among districts. This includes considering select middle school science labs and select high school science, technology education, physical education, vocational, and visual and performing arts classrooms capacity-generating regardless of whether indicated as such by the district in its LRFP.

A capacity utilization factor in accordance with the FES is included in the calculations. A 90% capacity utilization rate is applied to classrooms serving grades K-8. An 85% capacity utilization rate is applied to classrooms serving grades 9-12. A capacity utilization factor is not applied to preschool classrooms. Class size for all capacity calculations is based on the FES and is prorated for undersized classrooms. (*“Functional Capacity,” which determines “Unhoused Students” for potential State support for school facilities projects, is not used in this analysis.*)

A proposed project can receive up to six points for overcrowding and related considerations:

- **Existing overcrowding in grades served:** One point if the proposed project serves grades for which current district-wide enrollments exceed existing district-wide capacity.
- **5% or greater overcrowding in grades served:** One additional point if the proposed project serves grades for which current district-wide enrollments exceed existing district-wide capacity by more than 5%.
- **10% or greater overcrowding in grades served:** One additional point if the proposed project serves grades for which current district-wide enrollments exceed existing district-wide capacity by more than 10%. Since a 90% capacity utilization factor is applied to schools serving grades K-8, districts with a capacity deficiency greater than 10% are operating beyond maximum school capacity for these grades based on the number of district-identified general classrooms. High schools, whose capacities incorporate an 85% utilization rate, likely have scheduling difficulties and larger class sizes if 10% or higher overcrowding is identified.
- **15% or greater overcrowding in grades served:** One additional point if the proposed project serves grades for which current district-wide enrollments exceed existing district-wide capacity by more than 15%. Districts with a capacity deficiency of 15% or higher are operating beyond maximum school capacity. Current enrollments are likely accommodated through increased class sizes, the elimination of specialized classrooms, compromised program delivery, and/or temporary or leased facilities.
- **10% or greater district-wide overcrowding:** One point if current enrollments exceed total existing capacity for grades PK-12 by 10% or more. This gives additional consideration to districts that cannot relieve overcrowding by changing school grade alignments to utilize available capacity.
- **Increasing 3-year enrollments in grades served:** One point if enrollments in the grades served by the proposed project increased by 3% or more over the last three years. Although projected enrollments are not considered in this analysis due to their subjective nature, consideration is given to districts experiencing sustained growth trends.

### **FES Compliance**

(5 potential points; 28% of total potential points)

FES compliance in terms of square feet per student, classroom size, and school size is considered for the grade groups served by the proposed project. The analysis considers current enrollments and existing district-owned instructional buildings that are in service or that can return to service without significant renovation. Lack of compliance indicates educationally inadequate buildings that may be overcrowded and/or lack appropriate instructional spaces. FES compliance rating criteria also give consideration to districts that have sacrificed specialized instructional and administrative spaces to increase capacity for enrollment demands. For example, if a district eliminated art, music, and other specialized classrooms in its elementary schools to create additional capacity-generating classrooms, it may not receive rating points for overcrowding but would gain points for FES deficiencies.

A proposed project can receive up to five points for FES compliance issues:

- **District-wide square feet per student is less than the FES for grades served:** One point if total district square feet per student for the grades served by the proposed project, based on current enrollments and including district-owned buildings or long-term leases, is less than that prescribed by the FES.
- **25% or more students in schools providing less square feet per student than the FES for grades served:** One point if 25% or more of district students for the grades served by the proposed project are accommodated in facilities that provide less square feet per student than prescribed in the FES.
- **50% or more students in schools providing less square feet per student than the FES for grades served:** One additional point if 50% or more of district students for the grades served by the proposed project are accommodated in facilities that provide less square feet per student than prescribed in the FES. This weights projects in districts in which the majority of students in a particular school type are educated in non-FES compliant facilities.
- **Majority of students in undersized classrooms:** One point if at least half of a district’s students are taught in schools with general classrooms sized at least 10% less than the FES for the grades served in the proposed project.
- **Proposed school capacity equal to or greater than FES:** One point if the proposed project minimally provides the school capacity prescribed in the FES (early childhood center = 294; elementary school = 460; middle school = 675; combined elementary/middle = 689; high school = 900). This gives consideration to school projects that are efficiently sized and impact a significant student cohort.

### **Quality of School Buildings**

(4 potential points; 22% of total potential points)

General building conditions are assessed to prioritize projects in districts that have a substantial number of students in aged, educationally inadequate facilities. Given the limitations of existing building data and time constraints that prevent comprehensive field surveys, the building condition assessment uses building age as a starting point and then factors in FES compliance and completed renovations to broadly assess the quality of each school building.

District schools were classified, in order from best to worst condition, as “appropriate,” “marginal,” or “questionable” in each district’s Educational Facilities Needs Assessment. Criteria for the three classifications are as follows:

- **Appropriate facilities**
  - ✓ Constructed or major renovation within last 30 years (1980-present)
  - ✓ FES compliant (minimum square feet per student provided; average general classroom size within 10% of FES prescribed size)

- **Marginal facilities**
  - ✓ Majority of building less than 60 years old (1950-present) with no major renovation since original construction
  - ✓ Not FES compliant (less square feet/student than FES; average general classroom undersized by more than 10%)

OR

  - ✓ Majority of building between 31-100 years old (1910-1979) with no major renovation since original construction
  - ✓ FES compliant (minimum square feet per student provided; average general classroom size within 10% of FES prescribed size)
  
- **Questionable facilities**
  - ✓ Majority of building more than 60 years old (1949 or earlier) with no comprehensive renovation
  - ✓ Not FES compliant (less square feet/student than FES and/or average general classroom undersized by more than 10%)

OR

  - ✓ Majority of building more than 100 years old with no comprehensive renovation

OR

  - ✓ Building provides at least 25% less square feet per student than prescribed in the FES based on current school enrollments

The rating criteria for building quality prioritize projects in districts with the worst overall facilities conditions. A proposed project can receive up to four points based on building quality:

- **Majority of PK-12 students in marginal or questionable facilities:** One point if 50% or more of all district students are accommodated in buildings that have been determined to be marginal or questionable per the previously described criteria.
- **Majority of students in marginal or questionable facilities for grades served by project:** One point if 50% or more of district students in the grades served by the proposed project are accommodated in buildings that have been determined to be marginal or questionable per the previously described criteria.
- **Proposed project addresses “questionable” facilities:** One point if completion of the proposed project allows a building determined to be of questionable quality to be taken offline or improved by the proposed project.
- **Majority of district square footage is more than 60 years old without major renovation for grades served by project:** One point if the proposed project serves grades for which 50% or more of the total district square footage was constructed more than 60 years ago and has not been comprehensively renovated or educationally updated.

## Efficiency

(3 potential points; 17% of total potential points)

Consideration is given to district use of available capacity and whether a proposed project allows more efficient operations in terms of the number of school buildings or indirectly addresses deficiencies in other school(s). A proposed project can receive up to three points based on the following considerations:

- **At least 90% of all available district capacity is utilized after project completion:** One point if the district will use at least 90% of all available capacity after the proposed project is completed based on current enrollments.
- **School grade alignments efficiently utilize existing facilities:** One point if a change in school grade alignments will not reduce construction needs. This gives consideration to districts who utilize all available capacity. *(For example, a district would receive a rating point for a proposed elementary school project if the middle schools do not have surplus capacity to accommodate one entire grade from the elementary schools.)*
- **Project addresses overcrowding in other grades through existing school reassignment:** One point if completion of the proposed project allows an existing building to be reassigned to other grades that are overcrowded and/or have facilities that are not FES compliant, thereby addressing facilities deficiencies in more than one school type. This gives consideration to new construction projects that allow an existing building to be reassigned to other, often more appropriate grades that are overcrowded regardless of whether the project itself directly addresses overcrowding in the grades served. *(For example, one point if a proposed new middle school project allows an existing, educationally inadequate, middle school to be reassigned to elementary school grades in a district that has elementary school overcrowding.)*

## SDA Rating Criteria

The following describes the rating criteria used by the New Jersey Schools Development Authority to review projects identified for inclusion in a reformulated Capital Plan. In accordance with N.J.S.A. 18A-7G-5m, upon the New Jersey Department of Education's (DOE) determination of educational priority ranking of school facility projects in SDA districts, the Schools Development Authority shall establish a Statewide strategic plan to be used in the sequencing of projects based upon the projects' educational priority rankings and issues which impact the SDA's ability to complete the projects, including, but not limited to, the construction schedule and other appropriate factors.

As a first step toward development of a Statewide strategic plan, the SDA has developed rating criteria to identify projects which represent the most efficient and effective use of available funding. The rating criteria are intended to evaluate the projects advanced by DOE as to the most efficient use of public funds.

The proposed methodology for the SDA ranking of projects is similar to that utilized by the Department of Education for the educational prioritization:

- A rating "point system" is applied to each project based on specific criteria. Projects with a higher number of total points are considered to represent a more efficient use of funds and more appropriate for advancement.
- The rating criteria are designed to be as objective as possible and utilize readily available information.
- As the DOE rating criteria identifies projects which represent the greatest educational need, the SDA point ratings identify which of those projects also represent a more efficient use of available funds. Since each project included in the analysis represents a high priority educational need as identified by DOE and is worthy of consideration, a lower overall score for a project should not be interpreted as indicating that the project is not needed. Rather, a lower score indicates that other higher scoring projects represent a greater educational need and a more efficient use of available funds.

The SDA rating criteria considers and accounts for a number of factors which together contribute toward efficiencies in program and project delivery. While efficient use of available capital funds is chief amongst these, consideration has also been given to factors which impact the efficiency of the schools construction program. The SDA rating categories account for these considerations and encompass the following:

- **Efficient Response to Educational Need – Total Points: 3**  
How efficiently the proposed project responds to the identified educational need is evaluated by three metrics:
  - Design Net to Gross Ratio: *the ratio of the approved program area (instructional and support areas) to the gross square footage of the building (including hallways, toilets, storage areas, mechanical rooms etc). SDA Planning allowance for this ratio is 1.50%.*
    - Does not meet SDA Planning Allowance (over 1.50%) = 0
    - Meets SDA Planning Allowance (1.50 up to 1.425%) = 0.5
    - More Efficient than SDA Planning Allowance by 5% or more (1.425 or less) = 1.0

*If the proposed project does not meet the SDA Planning Allowance, would redesign result in net improvement? If "No" then 0.5 point may be awarded to recognize that the present design is as efficient as possible.*

## SDA Rating Criteria

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- Building Construction Costs per Square Foot: *planning amounts for costs per square foot are general conservative estimates that are reflective of sound cost efficient building practices.*

Does not meet SDA Planning Allowance = 0

Meets SDA Planning Allowance = 0.5

More Efficient than SDA Planning Allowance by 5% or more = 1.0

*If the proposed project does not meet the SDA Planning Allowance, would redesign result in net improvement? If "No" then 0.5 point may be awarded to recognize that the present design is as efficient as possible.*

- Have alternate and more efficient approaches to addressing the educational need been considered?

Yes = See next question

No = 0

If "yes", was the proposed project found to be more cost effective than the alternate option(s)?

Yes = 1

No or Not yet Known = 0

*If a partially completed feasibility study exists or if other evaluative factors are in process that indicate efficiencies in pursuit then 0.5 point may be awarded. If no point is obtained for this metric and the proposed project garners sufficient points in the SDA Rating Criteria to proceed onto the reformulated Capital Plan, this question must be adequately addressed as part of advancement. If a more efficient and viable solution is identified, that solution must be evaluated for modification to the capital plan.*

### ▪ **Efficient Use of Public Funds – Total Points: 3**

How well the proposed project represents an efficient use of funds as authorized by P.L. 2008, c. 39 (NJSDA's New Funding Legislation) is evaluated by two metrics:

- Total Costs to Complete per Student as compared to the median of projects evaluated.

Greater than the Median Cost per Student (1.05% of median or greater) = 0

Median Cost per Student ( $\pm$  5%) = 0.5

Less than the Median Cost per Student (95% of median or less) = 1.0

- Total Project Cost

Greater than \$100 Million = 0

Greater than \$75 Million and less than \$100 Million = 0.5

Greater than \$50 Million and less than \$75 Million = 1.0

Greater than \$25 Million and less than \$50 Million = 1.5

Less than \$25 Million = 2.0

## SDA Rating Criteria

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▪ **Construction Schedule Factors – Total Points: 4**

How do construction schedule related factors align with the efficient use of public resources is evaluated by three metrics:

- Current Land Acquisition Status
  - Pending = 0
  - In Progress = 0.5
  - Complete or Not Required = 1.0
  
- Evaluation of Site & Environmental Risk Factors *(see the following detail)*  
*Based on established SDA criteria for evaluating the relative degree of uncertainty or risk associated with existing site and environmental conditions, projects are evaluated as follows*
  - Not Yet Identified or No Data Available for Evaluation = 0
  - Site Identified, Moderate Risk = 0.5
  - Site Identified, Minimal Risk = 1.0
  - Site Identified, Low Risk = 1.5
  
- Degree of Certainty as Aligned with Construction Schedule  
*Understanding that with the further advancement of a projects concept and design, costs and design efficiencies are less likely to change and represent a more accurate depiction of the ultimate final project costs.*
  - Obtained Pre-Development Approval = .5
  - Obtained Schematic Design Approval = 1.0
  - Obtained Final Educational Adequacy Approval = 1.5

### OVERVIEW OF RATING CRITERIA

SDA Rating Criteria	
Ranking Category (10 points total)	Percentage of Potential Points
Efficient Response to Educational Need (3 points)	30%
Efficient Use of Public Funds (3 points)	30%
Construction Schedule Factors (4 points)	40%

## SDA Rating Criteria

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### Evaluation of Site & Environmental Factors

The assessment process was performed by completing a review of the list of schools provided by the DOE. The objective was to evaluate the potential risk associated with the demolition, past usage, environmental and site development. This evaluation examined each project utilizing the criteria below with a maximum total of 19 points. Projects were then assigned up to 1.5 points for the overall SDA Rating Criteria based on the following ranges:

Not Yet Identified or No Data Available for Evaluation = 0

Site Identified, Moderate Risk (scored less than 65% of total points) = 0.5

Site Identified, Minimal Risk (scored between 65% and 80% of total points) = 1.0

Site Identified, Low Risk (scored 80% of total points or higher) = 1.5

#### **Demolition**

Demo Complete: Site demolition 100% complete including buildings, foundations and all known structures.

Special Demo/Disposal: Demolition that has the potential to increase project risk.

#### **Past Usage**

Undeveloped: Farmland, wooded or undisturbed property.

Residential/School (low): Current or former single family, multi-family, apartment buildings or educational facilities.

Mixed Use/Commercial (med): Multi-use sites containing a combination of residential, commercial, office and/or retail space.

Industrial/High Hazard /Unknown (high): Industrial, manufacturing, fueling facilities, landfills or sites with high potential for unforeseen conditions.

#### **Environmental Investigation**

PA/SI: Completed Preliminary Assessment and/or Site Investigation.

RAWP: Remedial Action Work Plan has been submitted to the DEP defining the corrective action.

RAR Sub/NFA Issued: Remedial Action Report submitted or a No Further Action Letter issued by the DEP.

Property Restrictions (DN/CEA): Known or anticipated Engineering Control and Deed Notice or Classification Exception Area required for partial or entire site.

Regulatory Land Use Conflicts: Known or anticipated land use conflicts that limit or restrict site development such as wetlands or endangered species.

Historical Preservation Required: Requirement to document, retain or preserve historical elements.

#### **Remediation Risk**

Low: Total estimated remediation exposure less than \$500 K.

Medium: Total estimated remediation exposure greater than \$500 K but less than \$1.5 M.

High: Total estimated remediation exposure greater than \$1.5 M but less than \$3.0 M.

Extreme: Total estimated remediation exposure in excess of \$3.0 M.

## SDA Rating Criteria

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### Evaluation of Site & Environmental Factors (continued)

#### **Site**

Utilities Impacts:	Extraordinary impacts associated with utility service runs, connections or upgrades associated with the project.
Drainage Concerns:	Extraordinary engineered storm water measures impacting layout and construction.
Offsite Improvements:	Improvements to publicly owned facilities requiring upgrade as a result of site generated impacts such as highway ramps and traffic improvements.
GeoTechnical Concerns:	Poor soil quality or unsuitable fill material impacting construction.
Ground Water Concerns:	Shallow ground water elevation impacting construction.
Foundation Concerns:	Extraordinary foundation considerations such as the use of piles, caissons or mat foundations.