STATE OF ARKANSAS

DIVISION OF PUBLIC SCHOOL ACADEMIC FACILITIES and TRANSPORTATION

2014 MASTER PLAN/PARTNERSHIP PROGRAM GUIDELINES for 2015-2017 Biennium

Arkansas Division of
Public School Academic
Facilities and Transportation

MASTER PLAN SUBMITTAL DEADLINE FEBRUARY 1, 2014

PARTNERSHIP PROJECT APPLICATION DEADLINE MARCH 1, 2014

TO EFFECTIVELY CREATE MASTER PLANS AND SUBMIT PARTNERSHIP PROGRAM PROJECTS FOR FUNDING YEARS 2015 – 2017 USE THE FOLLOWING WEBSITE:
http://masterplan.arkansasfacilities.arkansas.gov

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I. Purpose

The Academic Facilities Master Plan (A.C.A. §6-21-805) is one of the foundations of the Arkansas Public School Academic Facilities Program. The purposes of the Master Plan are to -

- Establish a mechanism for State supervision of school district activities impacting academic facilities and equipment;
- Develop and update information critical to identifying academic facilities needs at the local level and across the state; and
- Allow the State to manage state financial participation in eligible academic facilities projects

A.C.A §6-21-806 requires that school districts:

- Develop a six (6) year district wide facilities master plan that shall be approved by the school district's board of directors for submission to and approval by the Division of Public School Academic Facilities and Transportation;
- Base its facilities master plan on the provisions of the Arkansas School Facility Manual as adopted by the Commission for Arkansas Public School Academic Facilities and Transportation and on priorities indicated by statewide assessment, on priorities established by the Division of Public School Academic Facilities and Transportation.
- Present a draft of the facilities master plan in a public hearing in the same locality as the school district and take public comments;
- Submit a facilities master plan with a summary of comments made at public hearing to the Division by February 1 of each even numbered year; and
- Submit a report and preliminary master plan to the Division each odd-numbered year that includes a description of all projects completed in the school district since the submission of the most recent facilities master plan, the school district's current enrollment projections, new or continuing needs of the school district with regard to academic facilities and equipment, and an accounting of any changes in the school district's insurance coverage from the most recent submission.

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II. Master Plan Requirements

School districts must submit its Master Plan in electronic format using the Master Plan web tool that addresses the statutory requirements of A.C.A. § 6-21-806. The 15 tabs are listed below and described in the following paragraphs. Each paragraph indicates whether the information is entered or uploaded in the web based master plan tool that is located on the division's web site at http://masterplan.arkansasfacilities.arkansas.gov/

District Overview

- Tab 1 – District Information Page
- Tab 2 - School Board Resolution
- Tab 3 – Public Hearing
- Tab 4 – District Enrollment Projections (Not required. Optional if district provides revised enrollment projects)
- Tab 5 - Community and District Profile (Not required). See planning Considerations
- Tab 6 –Narrative Analysis

Facilities

- Tab 7 – Insurance Coverage
- Tab 8 – Identification of Access Issues
- Tab 9 – Custodial
- Tab 10 – Maintenance, Renovation, Repair Activities Schedule
- Tab 11 – Preventative Maintenance Documentation
- Tab 12 – Projected Replacement Schedule for Life Cycle Systems

Projects

- Tab 13 – Committed Projects
- Tab 14 – Planned New Construction Projects

Financial

- Tab 15 – Annual Expenditures for Maintenance/Repair and Capital Outlay

NOTE: Tabs require on-line completion and/or document upload. Instructions on how to upload documents can be found in Appendix A Pages A-6 – A-38

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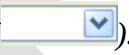
District Overview

Tab 1. District Information Page. (Enter)

Tab 2. School Board Resolution. (Upload)
Provide a copy of the signed School Board resolution that approved this Master Plan.

Tab 3. Public Hearing. (Upload)
Provide a description of how your community was involved in the development of this six-year master plan. Include a "summary of comments made at public hearing"; including dates, times, places of the meetings, and approximate number of attendees.

Tab 4. District Enrollment Projections. (Not required. Optional if district provides revised enrollment projections.) (Upload)
The district's enrollment growth and suitability needs are predicated on the maximum projected enrollment during the next ten years. Enrollment projections for each district are available for viewing at the division's web site. *(Click on the* District/School Reports *button under the* Key Links *heading on the homepage. Click on* District Summary Report *link where you can select your district by clicking the drop down arrow(*  *). After selecting your district, click on the* Run Report *button and the "District Report" will appear momentarily.* Current enrollment projections posted on the web site were developed using the latest actual student enrollment. Revised enrollment projections are available on the Division's web site as they are updated.

The Cohort-Survival method was used to develop the projections provided on the web site. If the district agrees with these projections no further action is required. If the district believes that the provided enrollment projections are not the best representation of future enrollments, districts may submit for consideration an enrollment projection displaying the district's current enrollment projections by grade level for the next ten years. The district projection must also include an analysis of the demographic or other factors that substantiate the differences in their projections with those provided by the Division.

Tab 5. Community and District Profile (Submittal not required). Planning Considerations: (Upload)

School district existing and anticipated future conditions affect school facilities. The following areas should be considered in your planning for school district needs.

Facility Information

1. Facilities not owned by the district but used (or jointly used) by the district.

2. Land that is being purchased by the district.

3. Portable buildings used for academic purposes. (Plans for replacement of portable buildings should be incorporated with this Master Plan.)

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4. District facilities that are being leased to other organizations.

5. Existing facilities owned by the district

Demographic Information

6. Population and geographic features of the district that affect school facilities needs and utilization (e.g. remoteness of communities, area of district, etc.)

7. Population trends of the school district and surrounding areas.

8. Economic environment of the district and surrounding areas (e.g. major new employers, closing of major businesses, etc.)

9. Other community factors that will affect school facility needs.

Educational Considerations

10. Current and future instructional delivery system(s) used in your district. (e.g. self-contained classrooms, team teaching, distance learning, block scheduling). Describe the anticipated effects on facility needs.

11. Educational programs that have unique school facility needs (e.g. reading recovery, vocational agriculture, technology). Identify the unique facility needs.

12. Anticipated school district boundary changes or consolidation of school districts within the district area.

13. Current district grade configuration, any anticipated grade configuration changes, and the anticipated effects on facility needs.

14. Transportation or food service issues that affect facility needs.

15. Planned local enhancements beyond statewide adequacy standards or any other educational considerations that could affect facilities.

Tab 6: Narrative Analysis: (Upload)

Section 4.03.10[1] of the Rules Governing the Six (6) Year Facilities Master Plan states that master plans shall include a "narrative analysis of facility needs and response plans to address the overall district strategy of providing suitable, adequate and maintained public school facilities." The narrative should address enrollment (growth or decline) , the district's plan to address enrollment changes, any adequacy needs for program support and instruction, warm, safe, and dry needs of facilities and district's plan for addressing those needs, note any portable buildings and strategy for eliminating portable buildings, overall district strategy for facility construction and/or system replacement. Narrative should also include any

[1] Rules cited throughout Master Plan section of this document refer to Facilities Master Plan Rules dated July, 2013 except as noted.

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building system end of life issues, and should address any projects the district plans on applying for FY 2015-2017 Partnership Program funding. Additionally, the district's narrative shall address buildings with zero percent (0%) or less building value in accordance to Master Plan Rule 4.04.2.

"**4.04.2.1 Each academic facility with a building value of zero percent (0%) or less shall be discussed in the narrative analysis per Section 4.03.10 of these Rules.**

Tab 7: Insurance Coverage. (Enter and Upload)

The district must provide a copy of their current Statement of Values from their insurance provider, such as the Arkansas School Board Association (ASBA), Arkansas Insurance Department, or any other provider of insurance for its school buildings**.** The information must include coverage amounts, types of coverage, square footage of buildings, identification of buildings covered, policy renewal dates, and all riders. Additionally, insurance coverage shall be at least 90% of the replacement cost for the district to receive any state facility funding assistance in accordance to Section 5.07 of the Partnership Program Rules.

5.07 "In accordance with Ark. Code Ann. § 6-21-114(d) and the Commission's Rules Governing Property Insurance Requirements, every academic facility must be insured for at least 90% of replacement cost to be eligible for state financial participation. If, as of the date of application or at any point thereafter, an academic facility involved in a project is not sufficiently insured as required, as indicated in the district's current Statement of Values, the application shall be denied by the Division and any state financial participation shall cease"

NOTE: 90% REPLACEMENT COVERAGE MUST BE STATED CLEARLY IN INSURANCE DOCUMENTATION.

Using the form provided in the Master Plan web based tool on the Division web site, enter the district's insurance coverage amounts for each of the stated categories. [Appendix A, page A-10] (Districts are reminded to be sure the minimum insurance values established by Arkansas Code Annotated §6-21-114 and the Rules Governing Property Insurance Requirements are met).

Tab 8. Identification of Access Issues. (Upload)

Provide the Division with identification of issues with regard to public school facility and program access for individuals with disabilities and, if applicable, proposed methods for improving access.

Tab 9. Custodial Activities Schedule. (Enter and Upload)

The district must provide its current schedule of custodial activities for each public school facility (building) in the district. Each schedule should be specific to a building. Districts can upload custodial schedules using the instructions found in the Appendix A, page A-14.

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Appendix B of the Custodial and Maintenance Manual (Section 3 of the Arkansas School Facility Manual) located on the Division's web site provides suggested custodial schedule formats.

Using the form provided in the Master Plan web based tool on the Division's website, enter the district's custodial staffing levels in Full Time Equivalency (FTE). [Appendix A, page A-12]

Tab 10. Maintenance, Renovation, Repair Activities Schedule. (Enter in SchoolDude)

Arkansas Code Annotated §6-21-808(c)(2)(B) requires all school districts to participate in the state level computerized maintenance management system (CMMS) designed to track work orders and preventative maintenance work. Use of the CMMS satisfies the statutory requirements for the district to "provide a schedule of maintenance, repair, and renovation activities for each public school facility used by the school district. The schedule must distinguish between work associated with academic facilities and work associated with nonacademic public school facilities."

When using the CMMS all maintenance, renovation and repair work orders (corrective work orders) generated on the CMMS should have the following information:

- All corrective maintenance work is documented as a work order in the CMMS (SchoolDude).
- Each work order should have one of the state authorized "Purpose Codes" as listed in the CMMS under the heading of Purpose, which is in the Information Analysis section of the district's SchoolDude homepage.
- Each work order should be assigned to a building as listed in the CMMS for that district.

Using the form provided in the Master Plan web based tool on the Division's web site, districts shall –

- Enter the district's maintenance/preventative maintenance staffing levels in Full Time Equivalency (FTE) [Appendix A, page A-12]
- (The form also provides a reminder on correct usage of the CMMS.)

Districts must download and sign the Statement of Assurance form provided in the Master Plan web based tool on the Division's web site. Districts must upload the signed Statement of Assurance form to Tab 10 under the Master Plan Documents (Tabs 1-15) heading in the Planning Tree pane. By completing this form the district attests to its compliance or noncompliance with Arkansas statute §6-21-808(c)(2)(B). [Appendix A, page A-14]

Tab 11. Preventative Maintenance Documentation. (Enter in SchoolDude)

A.C.A §6-21-808 requires all school districts to participate in the state level computerized maintenance management system (CMMS) designed to track work orders and preventative maintenance work. Use of the CMMS satisfies the statutory requirements for the district to "provide documentation that describes preventative maintenance work for each public school

facility and identifies the completion date of the work. The documentation must distinguish between preventative maintenance work associated with academic facilities and preventative maintenance work associated with nonacademic public school facilities."

The preventative maintenance work orders generated on the CMMS should have the following information:

- All preventative maintenance work is documented as a work order in the CMMS.
- Each work order must have one of the state authorized "Classification Codes" as listed in the CMMS under the heading of Classification as listed in the Information Analysis section of the district's SchoolDude homepage.
- Each work order must be assigned to a building as listed in the CMMS for that district.
- The district must assign a schedule of preventative maintenance for each building system in each building in the district. These schedules will be assigned via the CMMS in the Preventative Maintenance (PM) Direct module in the Information Analysis Section under the title of PM schedules.

Section VI of the Custodial and Maintenance Manual (Section 3 of the Arkansas School Facility Manual) located on the Division's web site provides processes and procedures for PM inspection of facility systems.

Tab 12. Projected Replacement Schedule. (Enter)

The district will provide a projected replacement schedule for major building systems in each public school facility. Using the form provided in the Master Plan web based tool on the Division web site, districts should enter the year of projected replacement. One row must be completed for each public school facility, including non-academic facilities. The projected replacement date for the end of life system does not automatically mean the system will be replaced that year by the district, but represents the district's current forecast of the projected replacement date. [Appendix A, page A-13]

Projects. (Enter)

Use the Master Planning Web Based Application (located on the Division's web site).

Districts will use the web based tool to revise district information, to indicate 2004 assessment deficiencies corrected and other facility projects that have been completed, and to enter district facility Master Plan projects. Appendix A of these Guidelines contains instructions on how to use this tool, and instructions and helpful information are also included within the application. You can access the tool by logging onto the Division's web site at http://arkansasfacilities.arkansas.gov/ and going to the link for the Master Planning application. The following instructions and Appendix A references should be followed when using this application. Districts should be able to review and revise much of the required information from their 2013 preliminary Master Plan.

a. Revise District Information: The district will be required to enter a point of contact for Master Plan coordination with the Division [Appendix A, page A-5]. Revise other data as appropriate. [Appendix A, pages A-5 through A-7]

b. Review and update deficiency lists: Follow the instructions within the application to review the deficiency lists for all schools and buildings. Mark deficiencies that have been corrected as "completed". Mark deficiencies that the district believes are in error "suspended." [Appendix A, pages A-8 through A-10]

c. Enter Master Plan projects: [Appendix A, pages A-17 through A-37]

A Master Plan Project is defined as a new construction or major renovation project, regardless of funding source.

1. The district must enter **all** new construction projects, regardless of source of funding, for all public school facilities, including both academic and non-academic facilities, with a breakdown of the portion of each project between maintenance, repair, and renovation and new construction.

2. It is very important that project numbers are formatted correctly. Refer to page A-19 of these guidelines for the correct format.

3. The six year master plan must reflect projects planned to begin from July 1, 2014 through June 30, 2020.

   i. Immediate needs projects must be entered for fiscal years 2015-2017.

   iii. Intermediate needs projects must be entered for fiscal years 2018-2020

4. Districts should review and revise project information submitted for the February 1, 2013 Master Plan Update. [Appendix A page A-18]

   i. Revise project numbers, if necessary, to meet the required format and reflect year project planned.
   ii. Update project information, if necessary, such as project scope, dates, status, projected budget, and estimated annual costs.

5. Partnership Program Considerations.
   i. DISTRICTS SHOULD NOTE THAT PROJECTS TO BE SUBMITTED FOR PARTNERSHIP PROGRAM FUNDING FOR THE NEXT BIENNIUM, FISCAL YEARS 2015-2016 AND 2016-2017, MUST BE INCLUDED WITH THIS FEBRUARY 3, 2014 MASTER PLAN SUBMISSION. APPLICATIONS FOR PARTNERSHIP PROJECTS MUST BE COMPLETED BY MARCH 3, 2014.
   ii. To receive consideration for state financial participation, districts must

indicate Partnership Program application on the Project screen of the web tool and indicate whether the project is a year one or year two project. Inclusion of projects on the district's Master Plan, without indicating the project is to be submitted as a Partnership Program application, does not submit the project for consideration for Partnership Program.

d. Provide additional information for other capital projects and end of life deficiency projects completed since February 1, 2013.

   Step "b" on page 8 requires the district to review and indicate which deficiencies have been completed. For any of those completed deficiencies that were "end-of-life" system projects for any of five major systems (HVAC, roof, structural, plumbing, and electrical service) and for other completed capital facility projects, submit information including the project description, school, and total project cost using the web based tool. Districts must enter the completed projects using the same general process as outlined in step c. for new Master Plan projects with the following additional instructions.

   1. Scope – Include detailed scope of project and indicate the facilities funding program, if any, that the project received state financial participation from. For end of life projects, provide detailed system information including quantity, unit of measure, and year replaced so new life cycle information for the data system can be established
   2. Status - Complete
   3. Budget –Final total project cost

Tab 13. Committed Projects. (Upload) (Optional)

The district may upload a copy of the Committed Projects report from the Reports tab in the web tool. (This step is not required since committed project information is available in the project input screens).

Tab 14. Planned New Construction Projects. (Upload) (Optional)

The district may upload a copy of the Planned Projects report from the Reports tab in the web tool. (This step is not required since planned project information is available in the project input screens).

Financial Information.

Tab 15. Annual Expenditures for Custodial, Maintenance, Repair, and Renovation Activities and Capital Outlay (Upload)

The most current APSCN Annual Statistical Report contains much of this information. Item 58 on that report displays Maintenance/Operation of Plant Services, and Item 77 displays Capital Expenditures. For annual expenditures of the school district for custodial, maintenance, and repair activities, the district must distinguish between expenditures associated with academic facilities and expenditures associated with nonacademic school facilities.

The Annual Statistical Report may be found by going to the Arkansas Department of Education (ADE) web site located at http://arkansased.org/ and following the quick link to APSCN. From the APSCN menu select Reports, then select the Annual Statistical Report page.

III. Master Plan Submissions:

Even Numbered Year Submissions:

School districts are required to submit Master Plans, covering a six year period, by February 1 of each even numbered year. The plans will be submitted in the format contained herein and with the tabulated project data required.

Amended Master Plan Submissions:

Amended Master Plans may be submitted at any time during the Master Plan cycle when one of the following criteria has occurred:

1. A major enrollment change;
2. A major disaster;
3. A major curriculum change; or
4. An unforeseen occurrence.

The Amended Master Plan will take the same format as a Master Plan and remain effective until the next regular plan submission in the even numbered year. The amended Master Plan must fully explain the basis for the amendment. If applicable and needed to support the plan, the Amended Master Plan will be accompanied by any Locally Funded Projects (LFP) deemed necessary to implement the amended plan.

Applications for Partnership Program projects to support the amended plan will not be accepted, but will be submitted in the even numbered year with the regular cycle Master Plan and Partnership Program submissions.

Master Plan Appendix:

An appendix to the Master Plan is an adjustment to the most current approved plan. It is to be used when the school district starts or completes a LFP (Locally Funded Project) which is "100% raised and funded by the school district". The appendix to the Master Plan will include as a minimum:

1. An addition explaining the project and the circumstances as to why it is being added at this time.
2. The explanation will include the basis of funding. If the local funds are derived from mills, the explanation will include the number of mills available above the Uniform Rate of Tax.
3. A statement that the funding of this project is not detrimental to the funding requirements to insure the school district facilities are maintained in a warm, safe and dry condition.
4. The project will be added to the district project list in accordance with these guidelines.
5. The project will be subject to all applicable state reviews. The Division will approve the project upon compliance with state codes and standards.

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IV. Submission Requirements for February 3, 2014 Even Year Master Plan

Electronic submissions under this program must be entered into the web based master plan tool by midnight February 3, 2014 (February 1 is a weekend day). On February 4, 2014 the web based tool will become inaccessible for school district Master Plan input.

Checklist – Master Plan:

- Did you provide complete information for all required tabs?
- Does the master plan show planned new construction projects for 2014-2020, and do the projects support and accomplish the district's facility needs and objectives?
- DID YOU INCLUDE NEW CONSTRUCTION PROJECTS TO BE SUBMITTED FOR PARTNERSHIP PROGRAM FUNDING FOR 2015-2017 WITH THIS MASTER PLAN?

These Guidelines are presented as a general instructions to assist districts in completing District Master Plans. Districts should read the current Rules Governing the Facilities Master Plan to ensure all requirements are met.

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PARTNERSHIP PROGRAM:

I. Eligibility for Funding:

1. Arkansas Code Annotated §6-20-2507(b)(1)(C) establishes a minimum project cost for Partnership Program new construction projects of the lesser of $150,000 or $300 per student. Same system projects may not be combined across multiple facilities (campuses) nor multiple system projects combined to meet the minimum dollar threshold for Partnership Program funding, unless the project is a complete building renovation and replacement for all building systems. Exceptions to the minimum may be made for life safety projects such as fire alarms
2. Projects must be "new construction" projects as defined in paragraph 3.19[2] of the rules. Maintenance and repair projects including the simple replacement of facility systems are not eligible for Partnership Program funding.
    a. Per Partnership Program Rule Section 3.36.1, Warm, Safe, and Dry (Systems) projects include new construction projects that support a facility's needs as they pertain to fire and safety needs, roofing, major plumbing replacements, major electrical replacements, HVAC systems and structural needs. These projects must apply to the entire facility or system or if a separate building the entire building. Fire and safety needs include fire alarms and warning systems and fire prevention systems, but do not include surveillance systems, security systems or closed circuit TV systems. State financial participation for warm, safe, and dry (systems) projects for the 2015-2017 and 2017-2019 Project Funding Cycles will be subject to a statewide maximum limitation on the funds available.
    b. Space projects include Add-ons which are additions to existing school campuses whether a new building or an addition to an existing building (Partnership Program Rule Section 3.04), Conversion projects which convert an existing space into a missing space of a different type (Rule Section 3.13), and new school campuses (Rule Section 3.20)
    c. Per Partnership Program Rule Section 3.36.2 Warm, Safe and Dry (Space Replacement) projects include new construction projects to build a new academic facility to replace an existing academic facility that is not deemed by the division to provide students a warm, safe and dry educational environment. In some instances, districts may perform a total facility renovation instead of a building replacement. Total renovation as defined in this section essentially requires taking a building to structural steel and slab. The completed project must meet all Arkansas Facility Manual standards, including space standards.

II. Application Process

1. School districts must indicate intent to submit project by selecting the appropriate button in the web tool and complete the web tool partnership tabs, providing all requested information. Districts are also required to upload required documents such as schematics, board resolution committing the appropriate local matching funds, and complete the appropriate POR(s) if the project is a space project, including space replacement. (See POR section below).

[2] Rules cited throughout Partnership Program section of this document refer to Partnership Program Rules dated July, 2013

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2. All applications for state financial participation under this program for fiscal years 2016 (July 1, 2015 – June 30, 2016) and 2017 (July 1, 2016 – June 30, 2017) shall be submitted in accordance with Section 4.01 of these rules.
3. Project narratives, descriptions, and justifications submitted on the web tool application must be complete so that the division can fully understand the scope of the project in order to review the project and determine state financial participation, if applicable. Projects must also include a schematic (line) drawing as defined in Section 3.30 of the Partnership Program Rules with this application by March 3, 2014.

POR (Program of Requirements for Space Projects) Summary of Requirements
Districts will prepare a POR for each space project the district intends to apply for by March 3, 2014, for the 2015-2017 Partnership Program funding cycle. PORs shall be submitted electronically. The Program of Requirements worksheets are located on the Division website under the School Facility Manual link in Section 2, Chapter 5 of the manual. Detailed POR submission requirements as contained in the Partnership Program project application are as follows:

Existing Campus (Addition)

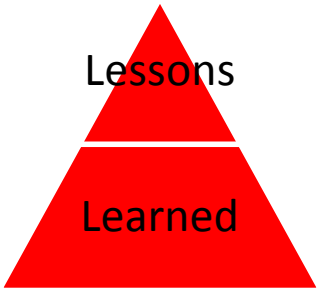
(A) District must submit completed Program of Requirements (POR) contained in Section 2, Chapter 5, Arkansas School Facility Manual for the existing school campus.
(B) On Summary sheet enter 10-year maximum projected NUMBER OF STUDENTS by grade configuration and TOTAL (ACADEMIC) SPACE OF EXISTING CAMPUS.
(C) On Suitability Analysis sheet enter gross area in SF for existing Physical Education, Media Center, Student Dining, and Performing Arts program areas if these spaces exist in the school and were completed prior to 2008.
(D) Enter all NEW SPACES included in the addition, conversion, or new building project.
(E) Enter QUANTITY and AREA of existing REQUIRED SPACES and Workforce Development spaces in their final configuration after any space conversions. (AREA of existing spaces may be estimated.)
(F) **If project involves a grade reconfiguration, submit a POR Summary sheet and Excess Suitability Analysis sheet for ALL schools affected by the reconfiguration.**

NOTE: If two campuses share spaces, they are considered one campus according to the POR. Example: If a K-6 campus shares a cafeteria with a 7-12 campus, the POR should be run as a K-12 campus.

New Campus

(A) District must submit completed Program of Requirements (POR) contained in Section 2, Chapter 5, Arkansas School Facility Manual as described below for new and existing school campuses.
(B) For new school campus, enter 10-year maximum projected NUMBER OF STUDENTS by grade configuration .
(C) Submit a POR Summary sheet and Excess Suitability Analysis sheet for each existing campus in the district with the same grade levels as the proposed new school or grade reconfigurations. (If district grade assignments are to be reconfigured, existing schools should reflect final grade configurations.)

(1) On Summary sheet enter 10-year maximum projected NUMBER OF STUDENTS by grade configuration and TOTAL (ACADEMIC) SPACE EXISTING CAMPUS
(2) On Suitability Analysis sheet enter gross area in SF for existing Physical Education, Media Center, Student Dining, and Performing Arts program areas built before 2008 if these spaces exist in the school.
(3) O the Suitability Analysis sheet under (**CHOOSE CORRECT ANALYSIS TYPE)** select the appropriate type (suitability or excess).



Although not required, it is beneficial to the district to provide documentation for values used in the Program of Requirements *(POR)* summary sheet and suitability analysis if the values are not obviously contained in the district and school reports found on the Division's web site. When data is not documented, the Division makes the best analysis possible using data in the Division's web site. Documentation sheets can be found on the Divisions web site:
http://arkansasfacilities.arkansas.gov/documents/11-13%20PROJECT%20APP%20BACKUP%20SHEETS%20052610.xls

III. On-Site Assessments:

Upon receipt and an initial review and evaluation of a school district's application for Partnership funding, the Division reserves the right to conduct an on-site assessment of the proposed project.

IV. Submission Requirements for 2015 – 2017 Partnership Program

Electronic submissions must be entered into the master planning tool by midnight March 3, 2014. On March 4, 2014 the web based tool will become inaccessible for school district project applications.

Checklist – Partnership Program Application

1. Is the Submit Project for 2015-2017 Partnership Program? Yes No button selected?
2. Has district indicated correctly Year One, 2015-16 Start or Year Two, 2016-17 Start.
3. Are all of the tabs completed with sufficient detail for division review?
4. Has the district uploaded a board resolution following the requirements?
5. Has district uploaded schematics following requirements?
6. Has district uploaded all required PORs?

<u>These Guidelines are presented as a general instructions to assist districts in completing District Partnership appications. Districts should read the current Rules Governing the Academic Facilities Partnership Program to ensure all requirements are met.</u>

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Appendix A

Arkansas Master Planning Application

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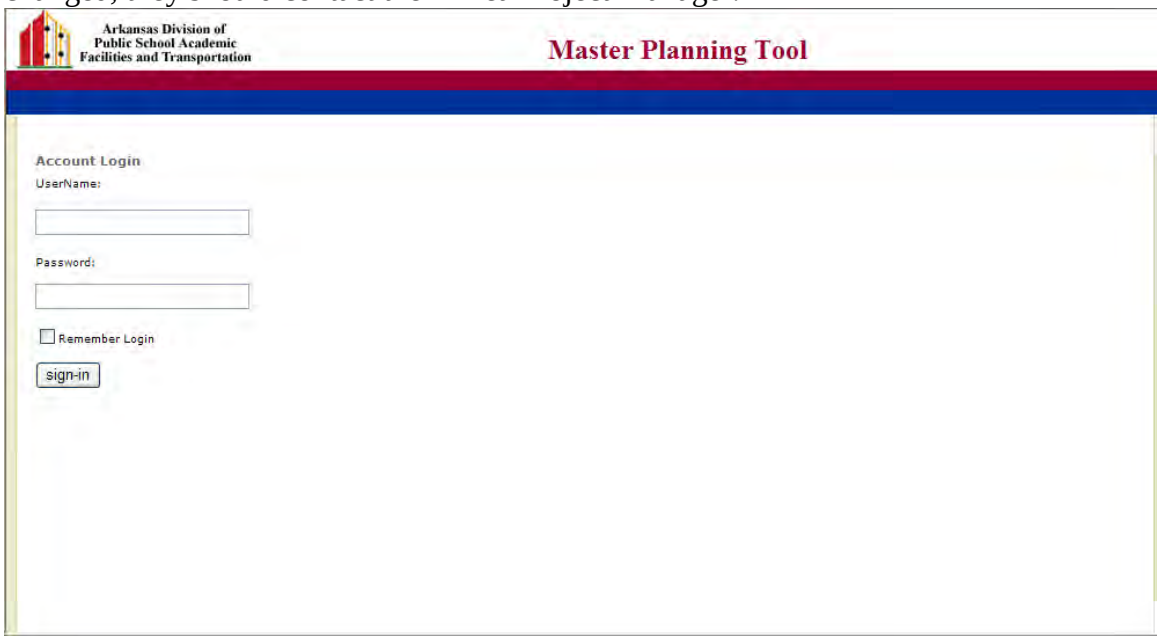
Log in

To Log in to the Arkansas Master Planning Tool, go to the Division web site at http://masterplan.arkansasfacilities.arkansas.gov/ Enter the appropriate credentials in the 'UserName' and 'Password' fields and click the sign-in button.

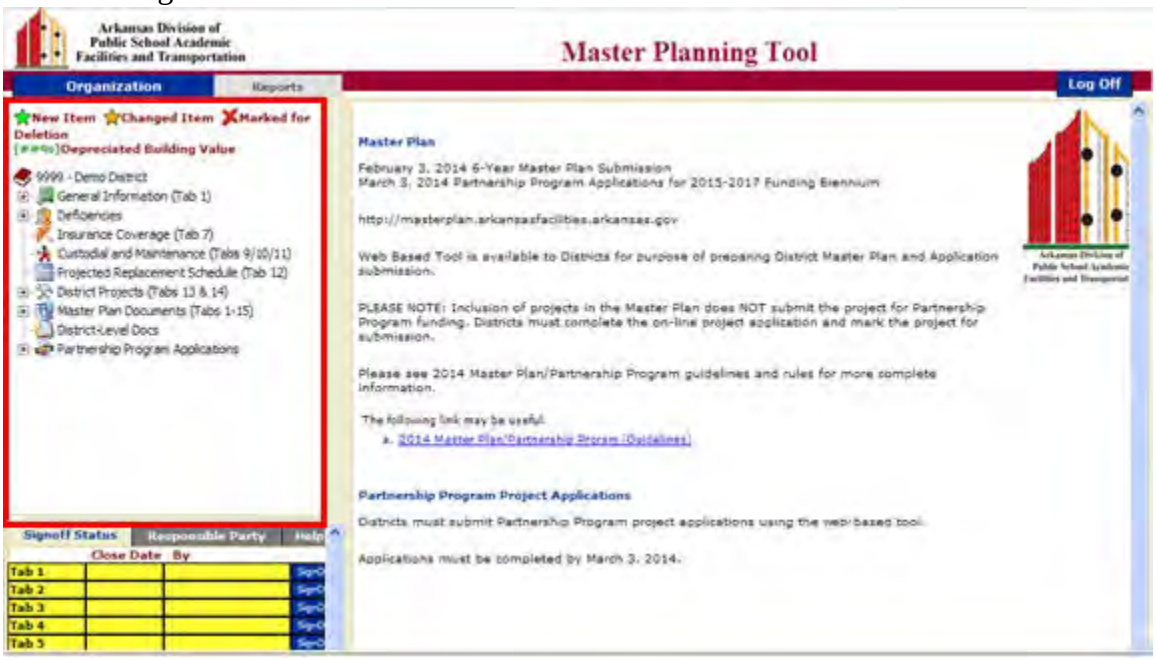
Area Project Managers can provide school districts with their User Name and Password information. If districts would like their "UserName" and "Password" credentials changed, they should contact their Area Project Manager.



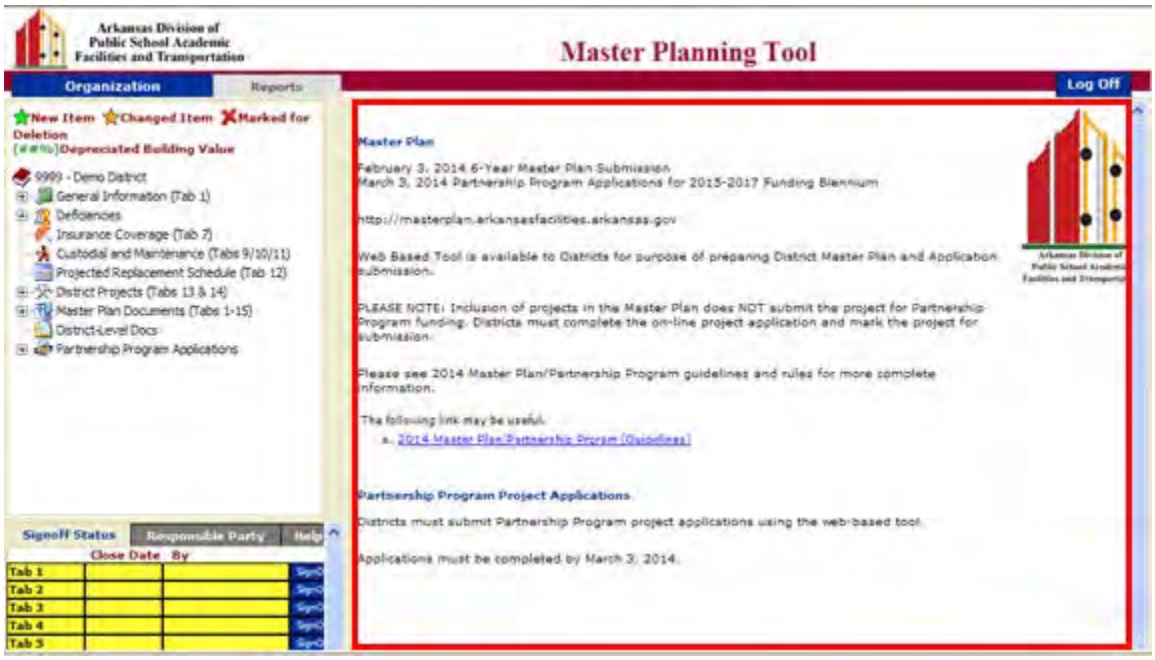
Main Screen

The initial screen is comprised of three separate components (or frames): The Planning Tree, The Information Pane, and The Help and Instruction Pane. These three frames are indicated in bold in the following three graphics.

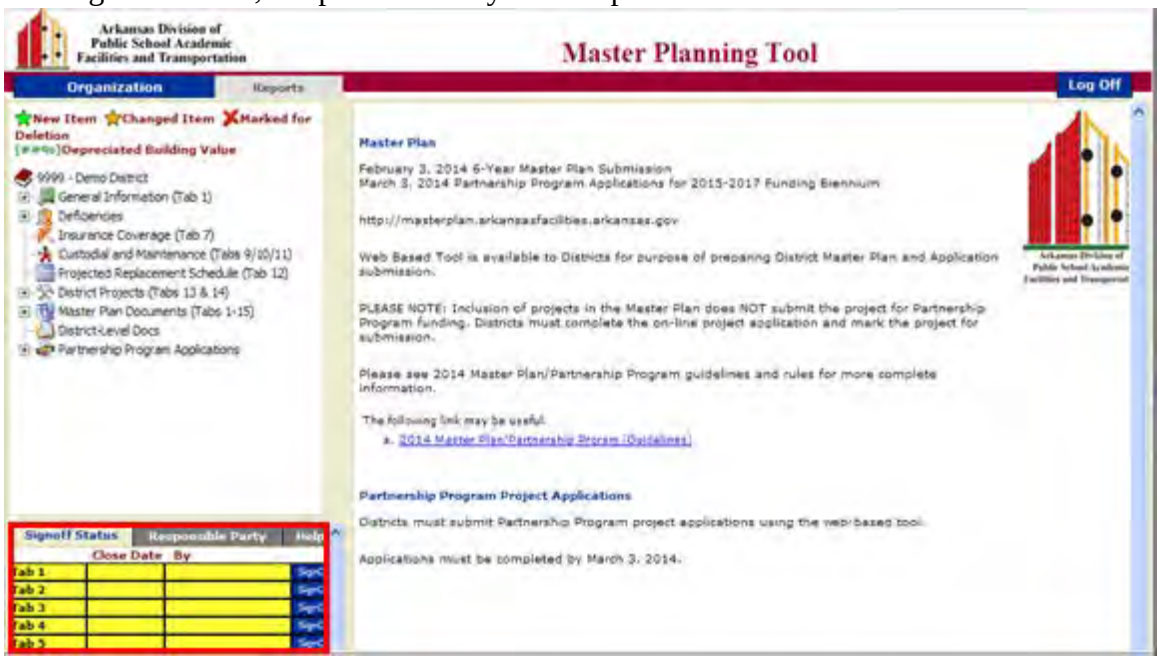
The Planning Tree



The Information Pane



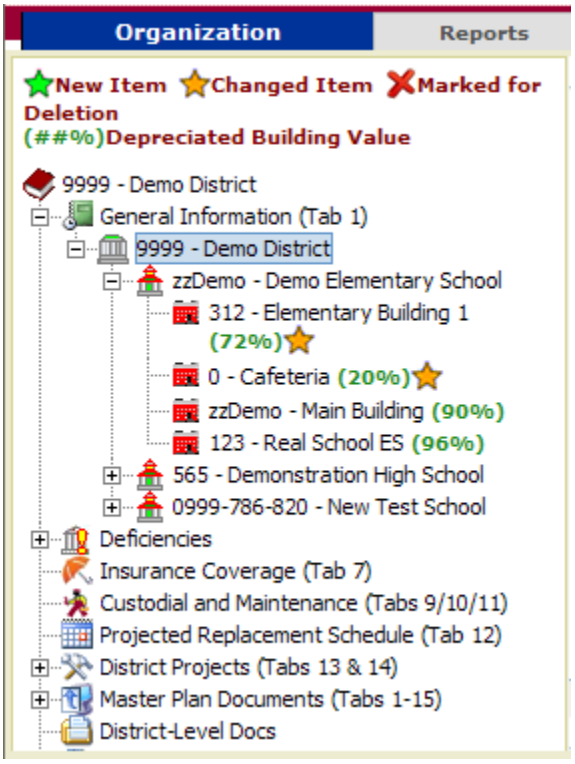
The Sign-off Status, Responsible Party and Help Pane



The Planning Tree and General Information Updates

Use the Planning Tree to navigate through the different tasks associated with the planning process. These tasks include General Information Updates (District, School, and Building), Assessment Deficiency Updates, the District Project Creation for the district's Master Plan, Projected Replacement Schedule, Master Plan Documents, and Partnership Program Applications.

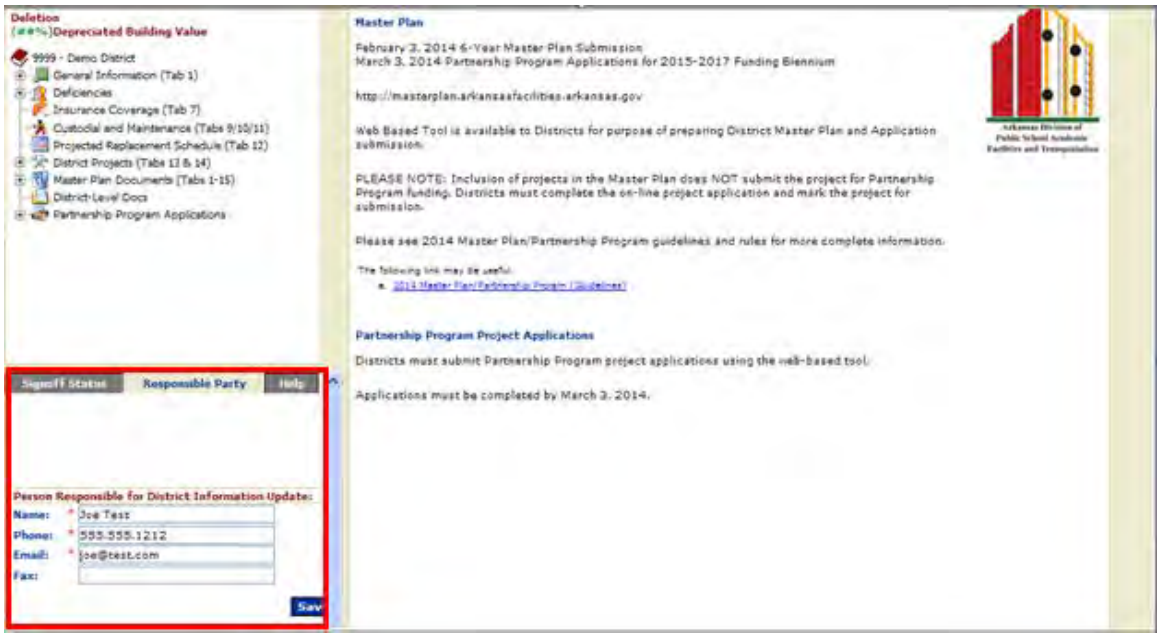
Click on the '+' or '-' to either expand or collapse the General Information or Deficiencies levels of the tree.



As seen in the preceding image, the tree has been expanded down to the School level in the General Information level of the tree. With the tree expanded, the user can then click on the lower level '+' symbol to expand that level and the Building Values % for each building will appear. This can be done until the tree has been expanded to the building level.

By clicking the '-'symbol that occurs after the tree is expanded, the user can collapse that particular level of the tree.

Green stars next to a level in the Planning Tree indicate that that level is a New Item. **Orange** stars indicate levels for which updates have been recorded. A **red** "X" indicates an existing School or building that you are asking to be deleted from inventory.

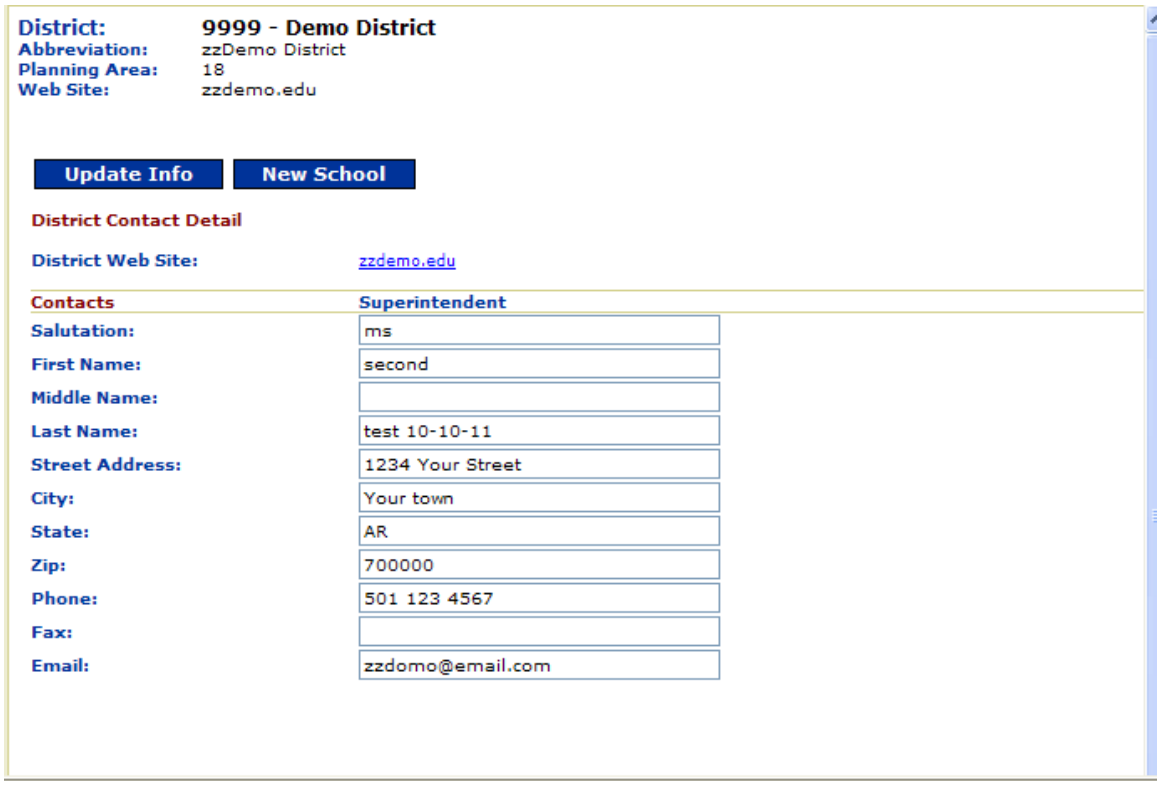


In the screen above, the user is required to complete the information for the Responsible Party before any updates can be performed. By entering their name and contact information into the Responsible Party portion of the application, the user enables the Division to contact the district in order to clarify issues or concerns with the information being collected.

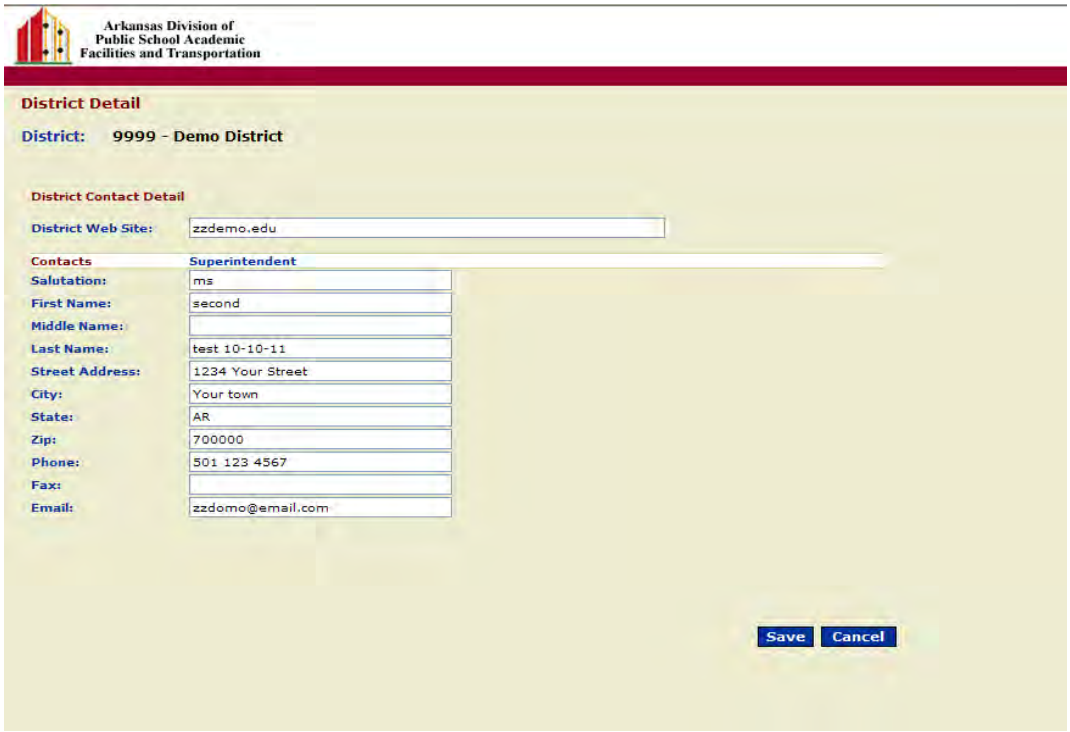
Upon entering the contact information into the Responsible Party text boxes, the user then clicks the **Save** button to save the information. The user is now allowed to make updates and edits to the information within the web-based Master Plan tool.

The user can now update the District Contact information or enter information about a new school that is not in the tree.

To edit the District Contact information, the user clicks on the General Information (Tab 1) button then the 9999 - Demo District button. Click the **Update Info** button as depicted in the following image:

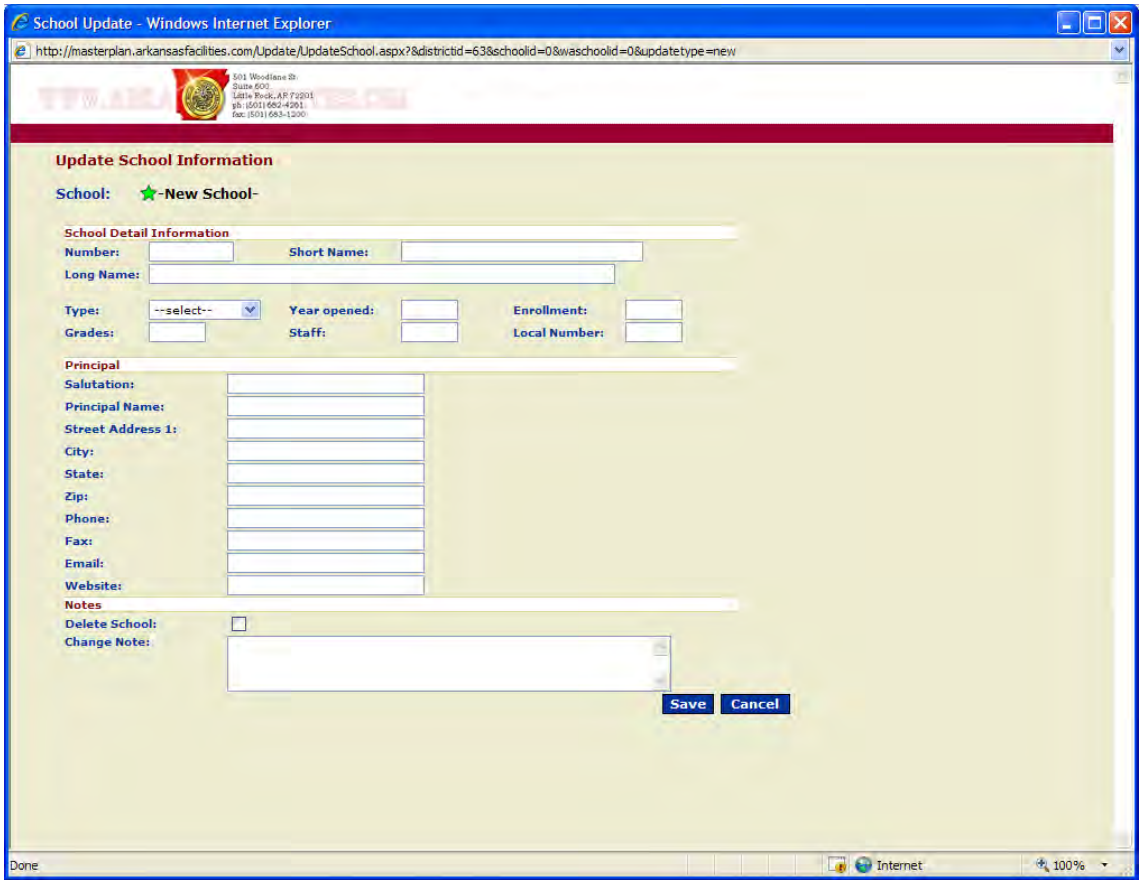


By clicking on the **Update Info** button the user generates the following update screen:



The user can then update the District Contact information directly into the text boxes provided and save it to the database by clicking the **Save** button. If changes are made that are not accurate or if the user does not need to update the information, the window can be closed without saving these changes by hitting the **Cancel** button. The user is returned to the District Information screen.

If the District has recently built or acquired a new school that is not listed with the other schools in the Planning Tree, the user can add the school to the system by clicking on the **New School** button. This will generate the following screen where the user can then enter the appropriate information into the text boxes and save it to the database by hitting the **Save** button. If information that is entered is inaccurate or not necessary, hitting the **Cancel** button will close the Update School Information screen without saving the changes to the database. The user will be returned to the District Update screen.



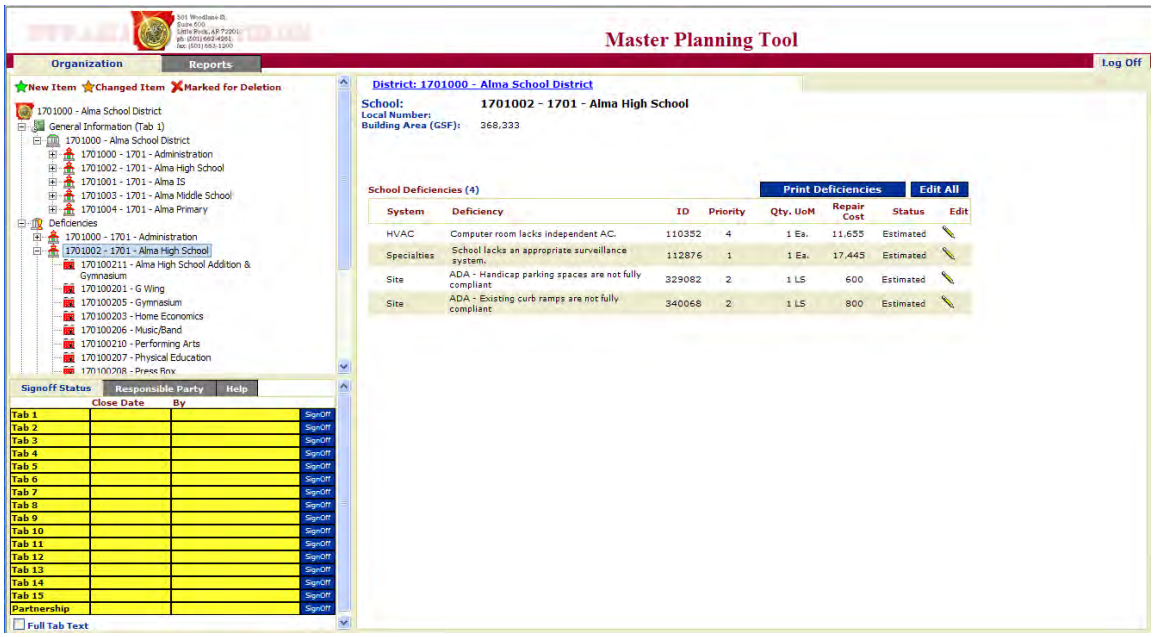
In order to edit the General Information related to both Schools and Buildings, the user would follow the same instructions outlined above for the District Update. At the School level, the user can update the School information or enter a new building. At the building level, the information associated with buildings can only be updated.

Deficiencies

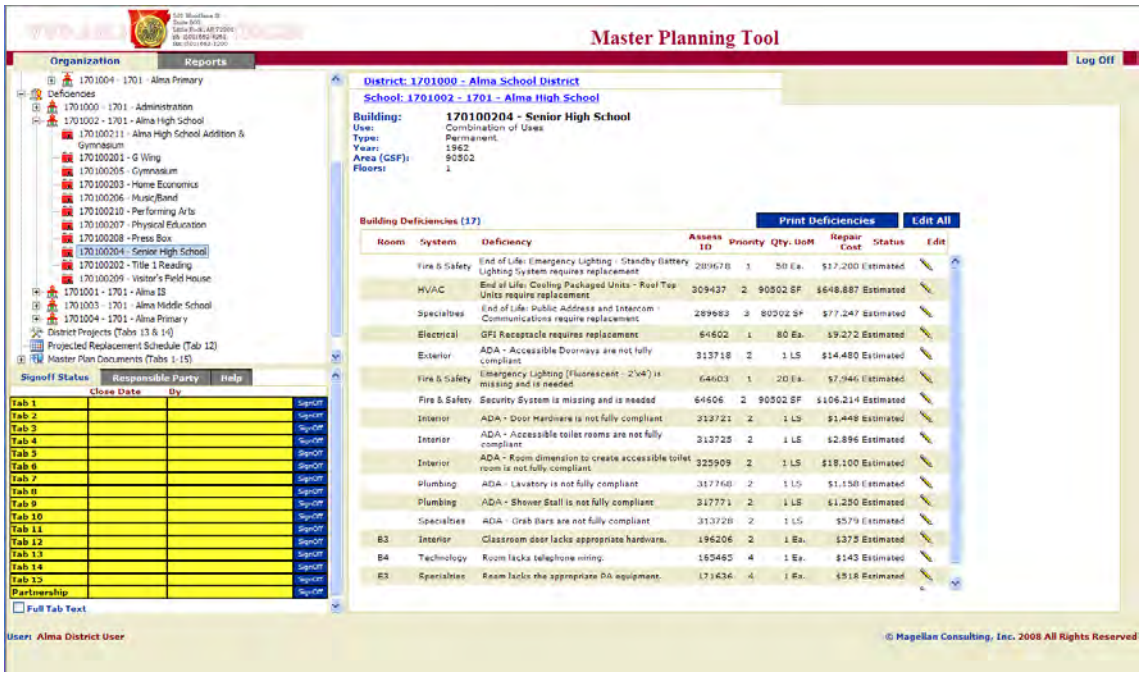
This Planning tool allows the user to update the status of deficiencies identified during the 2004 Facility Condition Assessment. The user can edit deficiencies to be either "Complete" or "Suspended" based on the current status of the deficiency with regards to the district's planning process.

Use the following definitions. For "Complete", districts should mark those deficiencies that the district has addressed completely. Do not mark as "Complete" if only partially completed and further work is necessary. For "Suspended", districts should mark those deficiencies that the district does not intend to address at any point in time.
In order to edit deficiency status, the user needs to expand the Planning Tree below the Deficiencies level to reveal the School level. At the school level of the tree, the user can edit the status of those deficiencies that are specific to the site or campus for that school. The user can also expand the school level of the tree to find the buildings associated with that campus. Clicking on a building will generate a list in the information pane of all the deficiencies associated with that building.

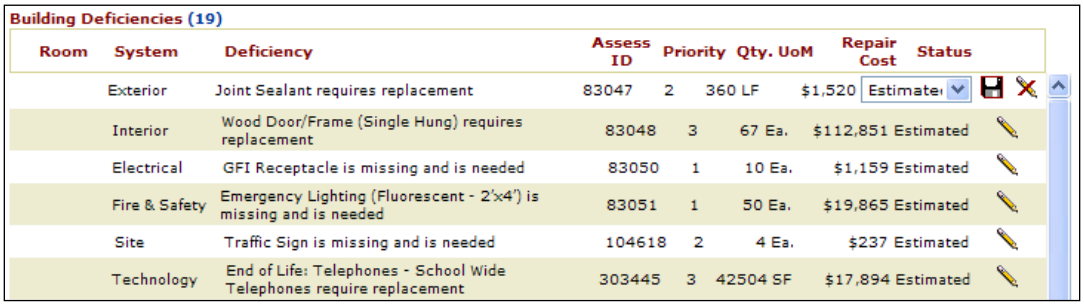
Below is a view of the school level deficiencies:



Below is a view of the building level deficiencies:



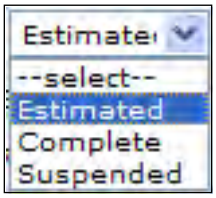
In order to edit the status of a deficiency, click on the button. The Status field will change to appear like the example below:



Building Deficiencies (19)

Room	System	Deficiency	Assess ID	Priority	Qty. UoM	Repair Cost	Status	
	Exterior	Joint Sealant requires replacement	83047	2	360 LF	$1,520	Estimate	
	Interior	Wood Door/Frame (Single Hung) requires replacement	83048	3	67 Ea.	$112,851	Estimated	
	Electrical	GFI Receptacle is missing and is needed	83050	1	10 Ea.	$1,159	Estimated	
	Fire & Safety	Emergency Lighting (Fluorescent - 2'x4') is missing and is needed	83051	1	50 Ea.	$19,865	Estimated	
	Site	Traffic Sign is missing and is needed	104618	2	4 Ea.	$237	Estimated	
	Technology	End of Life: Telephones - School Wide Telephones require replacement	303445	3	42504 SF	$17,894	Estimated	

The user can now select the drop-down arrow next to the repair cost and generate the following list:



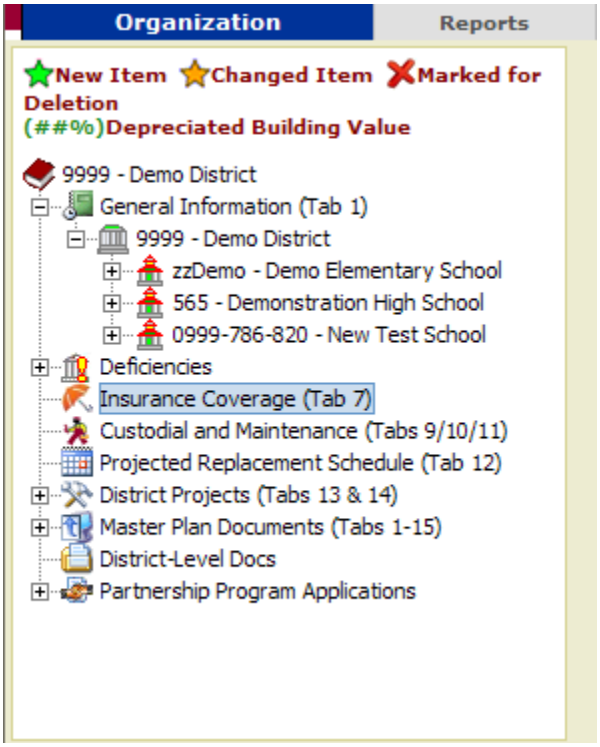
At this point the user may change the deficiency status to either Complete or Suspended. Once the status has been changed, the user would click the button to save the change.

Changing the status of the deficiency to Complete or Suspended will remove the deficiency's cost from the database of needs for that particular site or building. The user can edit as many of the existing deficiencies as necessary.

To cancel the edit, the user can click the button.

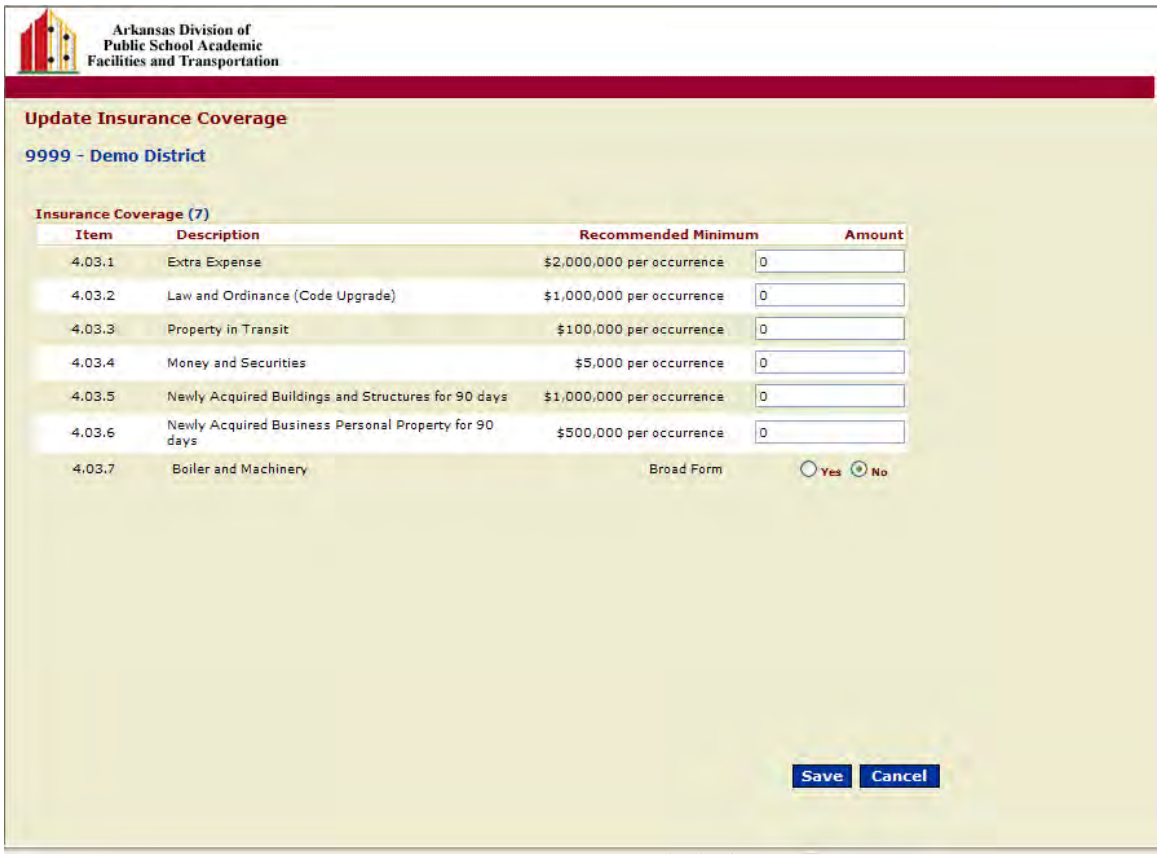
Insurance Coverage

To complete the Insurance Coverage information required for Tab 7, select the Insurance Coverage item in the tree.



The current insurance information will be displayed in the list to the Information Pane.

To edit this data, click the Edit All button. The Update Insurance Coverage form will appear as seen in the following screen



Arkansas Division of
Public School Academic
Facilities and Transportation

Update Insurance Coverage

9999 - Demo District

Insurance Coverage (7)

Item	Description	Recommended Minimum	Amount
4.03.1	Extra Expense	$2,000,000 per occurrence	0
4.03.2	Law and Ordinance (Code Upgrade)	$1,000,000 per occurrence	0
4.03.3	Property in Transit	$100,000 per occurrence	0
4.03.4	Money and Securities	$5,000 per occurrence	0
4.03.5	Newly Acquired Buildings and Structures for 90 days	$1,000,000 per occurrence	0
4.03.6	Newly Acquired Business Personal Property for 90 days	$500,000 per occurrence	0
4.03.7	Boiler and Machinery	Broad Form	Yes No

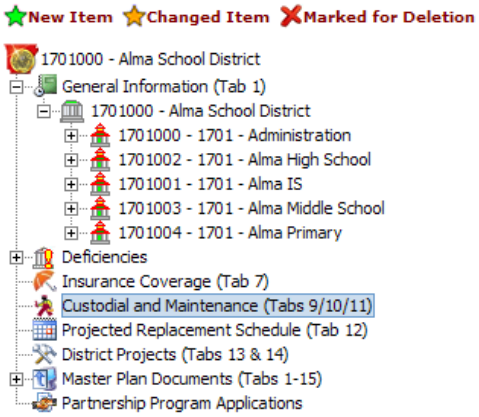
Save Cancel

Enter the appropriate insurance information for each item and click the **Save** button to save the data entered.

It is also required districts upload a copy of their insurance policy with statement of values and all riders.

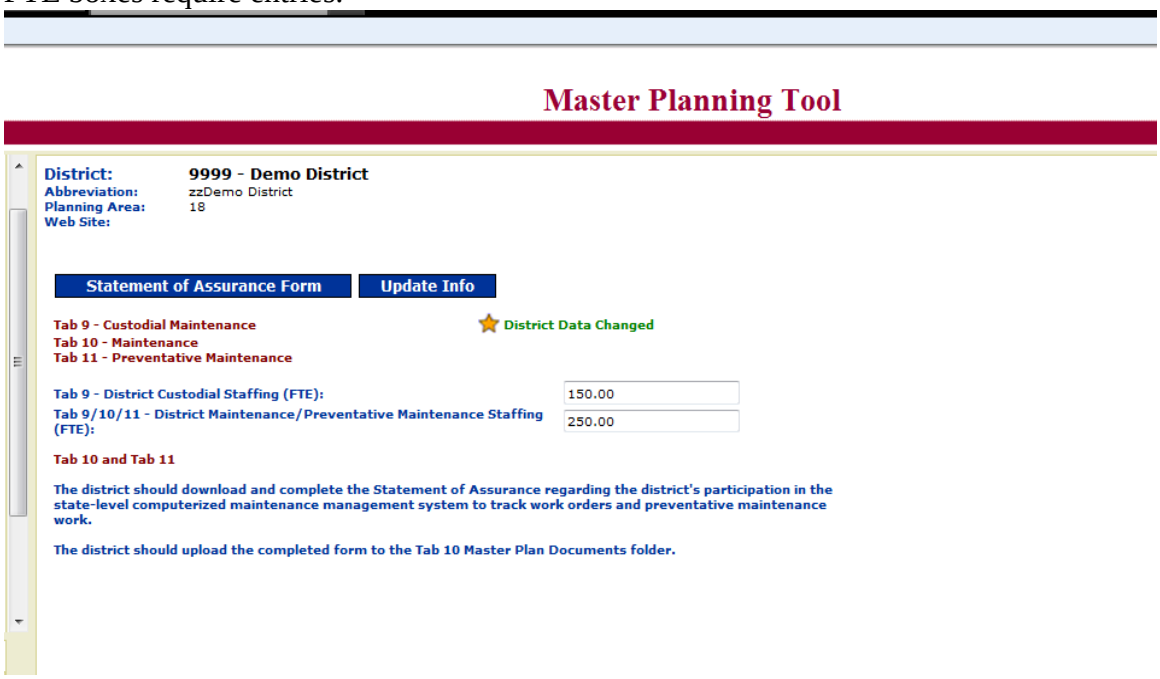
Custodial and Maintenance

To complete the Custodial and Maintenance information required for Tabs 9, 10 and 11, select the Custodial and Maintenance item in the tree.



The current Custodial and Maintenance information will be displayed in the Information Pane broken down by the specific Tabs. Press the **Update Info** button to edit the data. The Custodial and Maintenance Update form will appear.

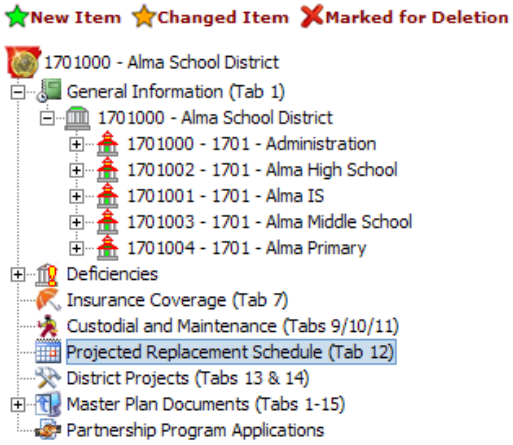
FTE boxes require entries.



To complete Tabs 10 and 11, districts need to download and complete the Statement of Assurance, then upload the Statement of Assurance to the Master Plan Documents section, Tab 10. <u>An original superintendent's signature is required on this form.</u>

Projected Replacement Schedule

To complete the Projected Replacement Schedule information required for Tab12, select the Projected Replacement Schedule item in the tree.



The current Replacement Schedule information will be displayed in the Information Pane broken down by the specific Tabs. Press the **Edit All** button to edit the data. The Update Replacement Schedule form will appear.

Update Replacement Schedule

1701000 - Alma School District

School Deficiencies (25)

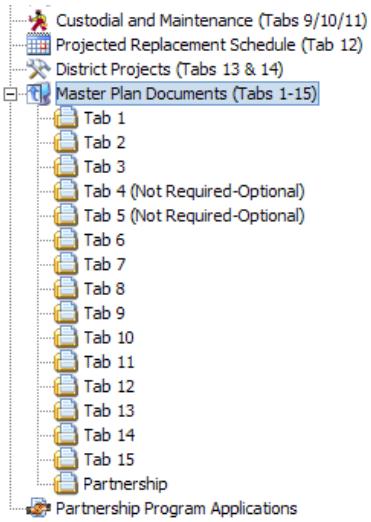
School Name	Facility/Building Name	Building Number	Year of Scheduled Replacement				
			HVAC	Roof	Plumbing	Electrical	Structural
1701 - Administration	Administrative	170100001	2015	2020	2020	2020	2030
1701 - Administration	Administrative Annex	170100004					
1701 - Administration	Maint/Storage	170100002	2015	2020	2020	2020	2030
1701 - Administration	New Warehouse	170100003					
1701 - Alma High School	Alma High School Addition	170100211	2015	2020	2020	2020	2050
1701 - Alma High School	G Wing	170100201	2015	2020	2020	2020	2030
1701 - Alma High School	Gymnasium	170100205	2015	2020	2020	2020	2020
1701 - Alma High School	Home Economics	170100203	2015	2020	2020	2020	2020
1701 - Alma High School	Music/Band	170100206	2015	2020	2020	2020	2030
1701 - Alma High School	Performing Arts	170100210	2015	2020	2020	2020	2050
1701 - Alma High School	Physical Education	170100207	2015	2020	2020	2020	2030
1701 - Alma High School	Press Box	170100208	2015	2020	2020	2020	2020
1701 - Alma High School	Senior High School	170100204	2015	2020	2020	2020	2030
1701 - Alma High School	Title 1 Reading	170100202	2015	2020	2020	2020	2020
1701 - Alma High School	Visitor's Field House	170100209	2015	2020	2020	2020	2030

Save Cancel

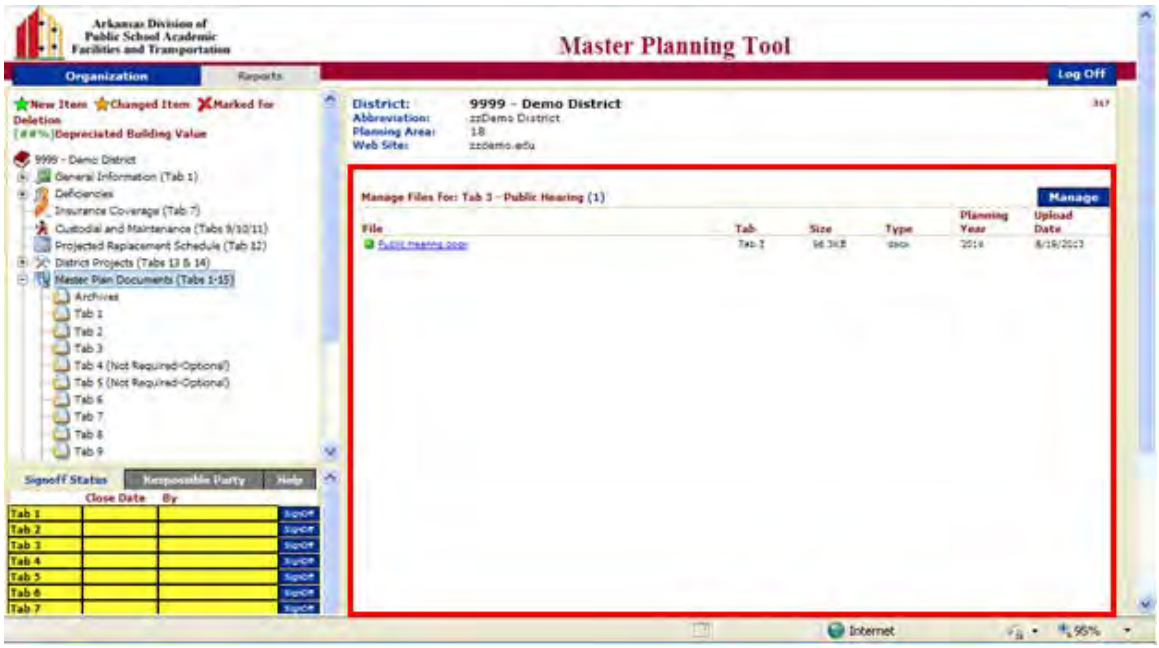
Provide or update the year of schedule for each building within the district and press Save to complete data entry.

Master Plan Documents Upload

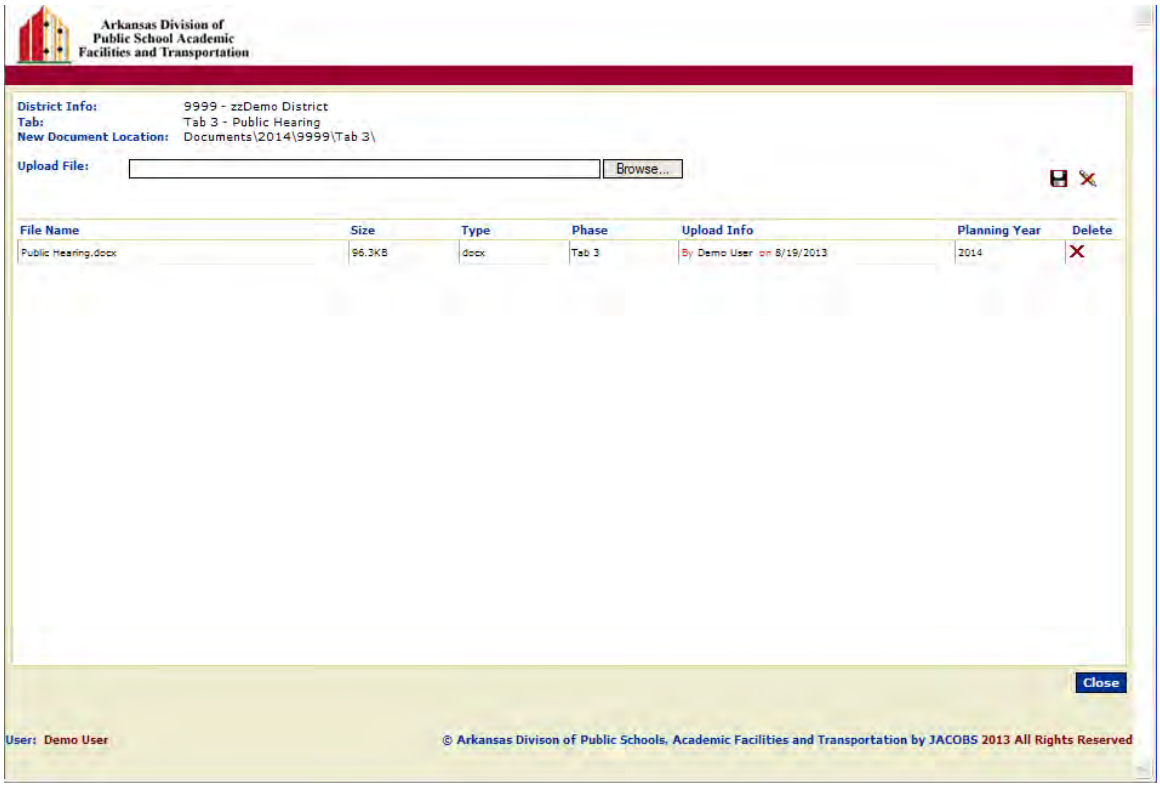
The Master Plan Documents (Tabs 1-15) heading will allow you to upload documents pertaining to each Tab associated with the submittal process. These documents can include required and supporting documents associated with a particular Tab's submittal requirements.



By selecting an individual tab below the Master Plan Documents (Tabs 1-15) heading, you will see a list of documents uploaded for the tab, including the information related to when it was uploaded.

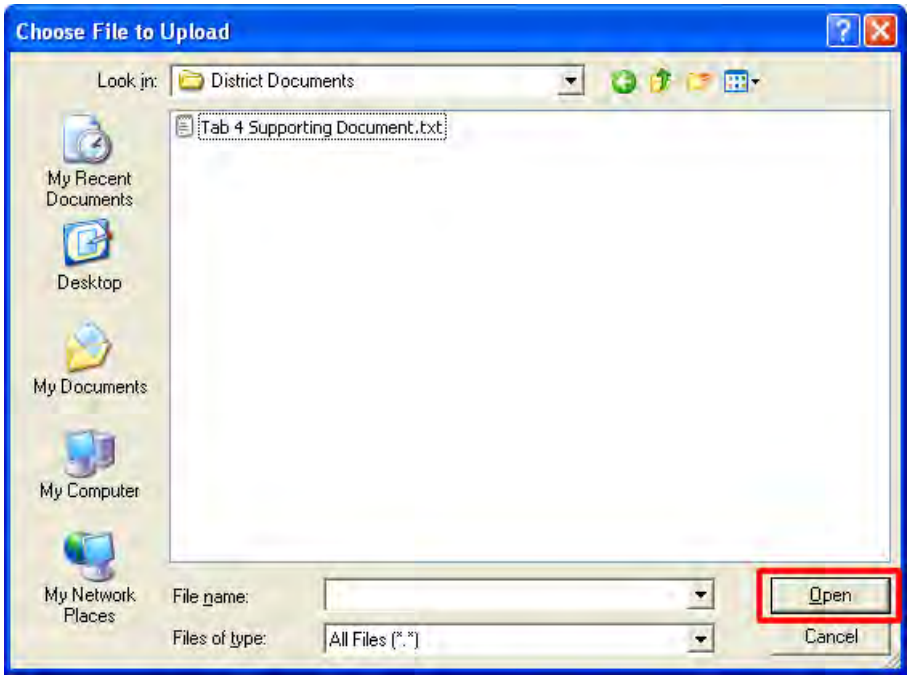


Press the **Manage** button to bring up the Manage Document form, which will allow you to select a document from a location on your computer or network and upload it to the Master Planning web tool.



Press the Browse... button to bring up the windows file system form, and navigate to the directory containing the file you wish to upload. Select the file by either double-clicking

on the file in this window or select it and press Open .

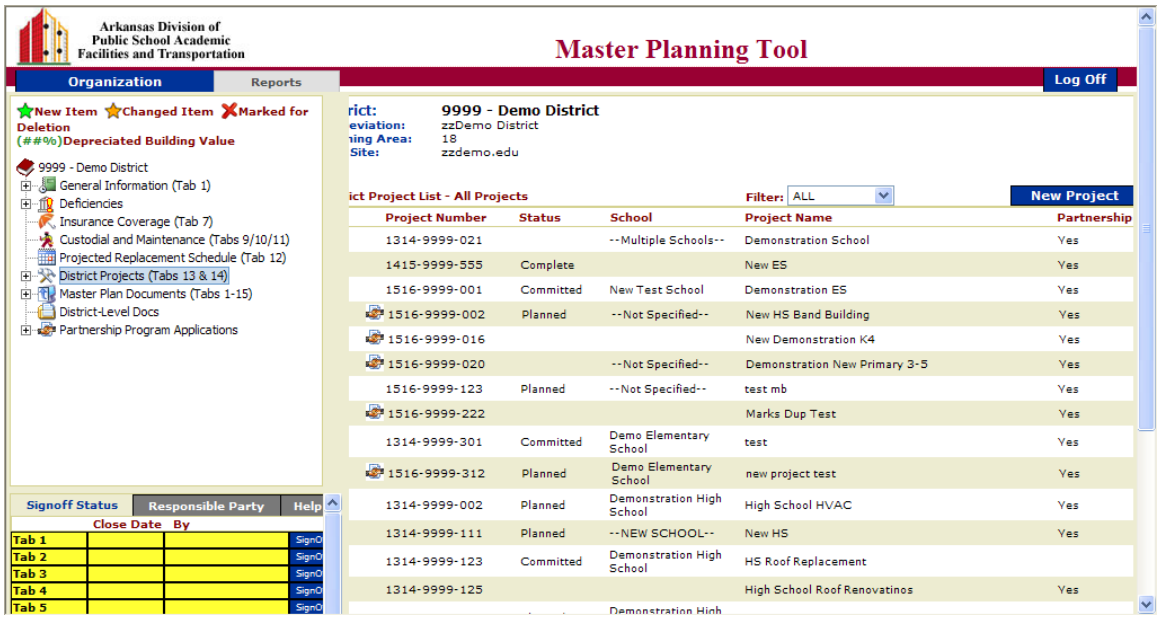


When you are done uploading documents, press close to return to the main form.

Note: You will only be able to delete documents from the current planning year. Documents from previous years can be downloaded and updated locally, but they will be uploaded as a NEW document for the current planning year and not a replacement to the previous year's document.

District Projects

The District Projects (Tabs 13 & 14) level on the Planning Tree is used for creating District projects. When the District Projects level has been selected in the tree, the user is presented with a list of previously entered projects in the Information Pane.



<u>Beginning with the 2013 – 2015 biennium, Master Plan submissions as well as Partnership Program project applications have been incorporated into the division web tool. This change was made to reduce paperwork for districts, as well as duplication of information on the Master Plan and the Partnership Program applications.</u>

Instructions are on the following pages.

To create a new project, the user clicks the **New Project** button. The user will be presented with the project creation screen as shown below:

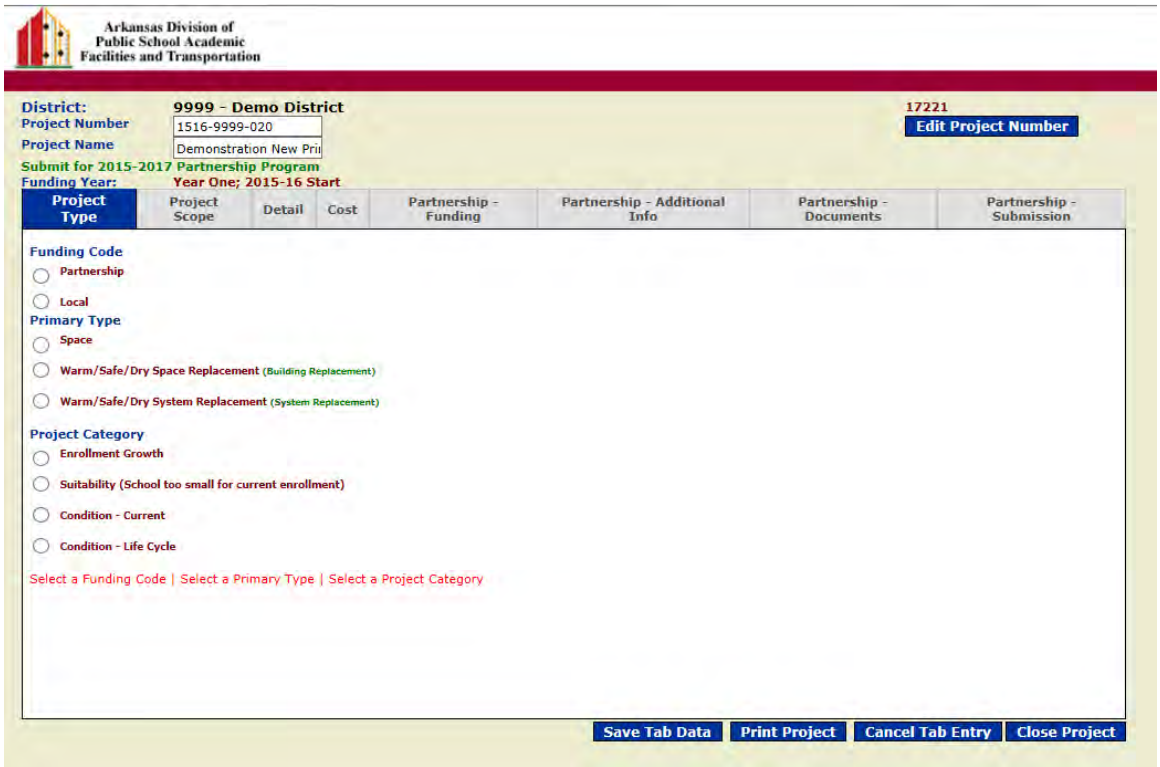
Project numbers should be in the following format that contains year-LEA- and number: y1y2-0LEA-xxx, where y1y2 are the last two digits of the fiscal year that the district will begin the project, and if applicable, request Partnership Program funding. For example, 1516 refers to a project that will begin in fiscal year 2016-2017 (July 1, 2015 – June 30, 2016). The middle four digits of the project number are the district's LEA number, including the leading zero, if applicable. The last three digits are a sequential numbering of district projects for year y1y2, beginning with 001. Locally Funded facilities projects should begin numbering at y1y2-LEAx-701. Sample project numbers are 1516-0901-004 and 1617-7401-702.

Project Name should be a short description of project.

If project is being submitted for the funding biennium 2015-2017, click the "Yes" button, and select "Year One" or "Year Two". Additional tabs become visible, allowing the district to complete (with the exception of resolution, schematics, PORs and other supporting documents) the Partnership Application on-line.

****NOTE: TO ACTIVATE A PROJECT ENTERED BEFORE 09/01/2011 AS A PARTNERSHIP PROJECT, USER WILL NEED TO CLICK ON THE PENCIL NEXT TO THE PROJECT (EDIT). WHENTHE PROJECT IS ON THE SCREEN, CLICK ON "EDIT PROJECT NUMBER". THIS WILL BRING UP THE ABOVE "CREATE NEW PROJECT" SCREEN. IF THE PROJECT FUNDING YEARS ARE CORRECT, INDICATE THE PROJECT IS FOR PARTNERSHIP SUBMITTAL. REMAINDER OF APPLICATION SCREENS WILL PRESENT THEMSELVES FOR DISTRCT COMPLETION AND SUBMITTAL*****

****NOTE: IF A PROJECT HAS BEEN SUBMITTED FOR PARTNERSHIP PROGRAM FUNDING PREVIOUSLY, NO CHANGES MAY BE MADE.**



The user can now enter the required information related to a Master Plan Project.

When developing a Master Plan project, districts should consolidate new construction projects for similar work that will be done with one construction contract on each campus. The first year of a project is the year when the design of the project is initiated, and for Partnership Program projects should be the year that the application is submitted for initiation and the Partnership Program Project Agreement is signed. For example, a Partnership Program project with a beginning year of 2015-2016 is a project that is

anticipated to be approved, the project agreement signed, and design begun during the period July 1, 2015 – June 30, 2016.

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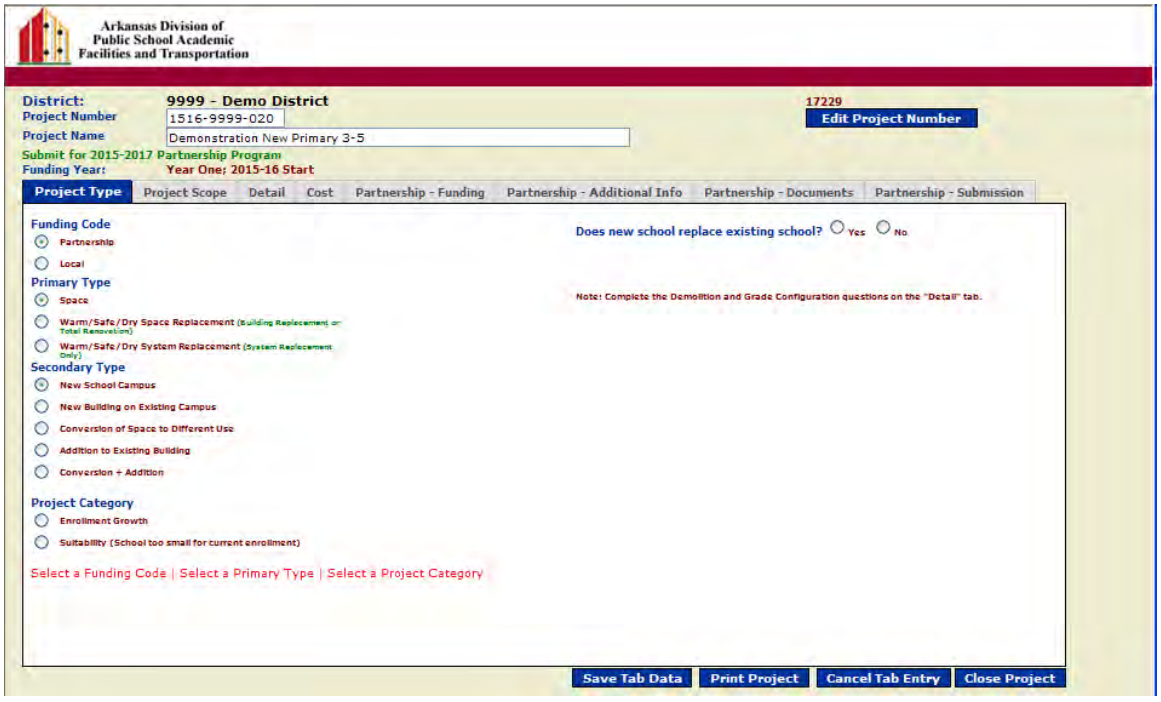
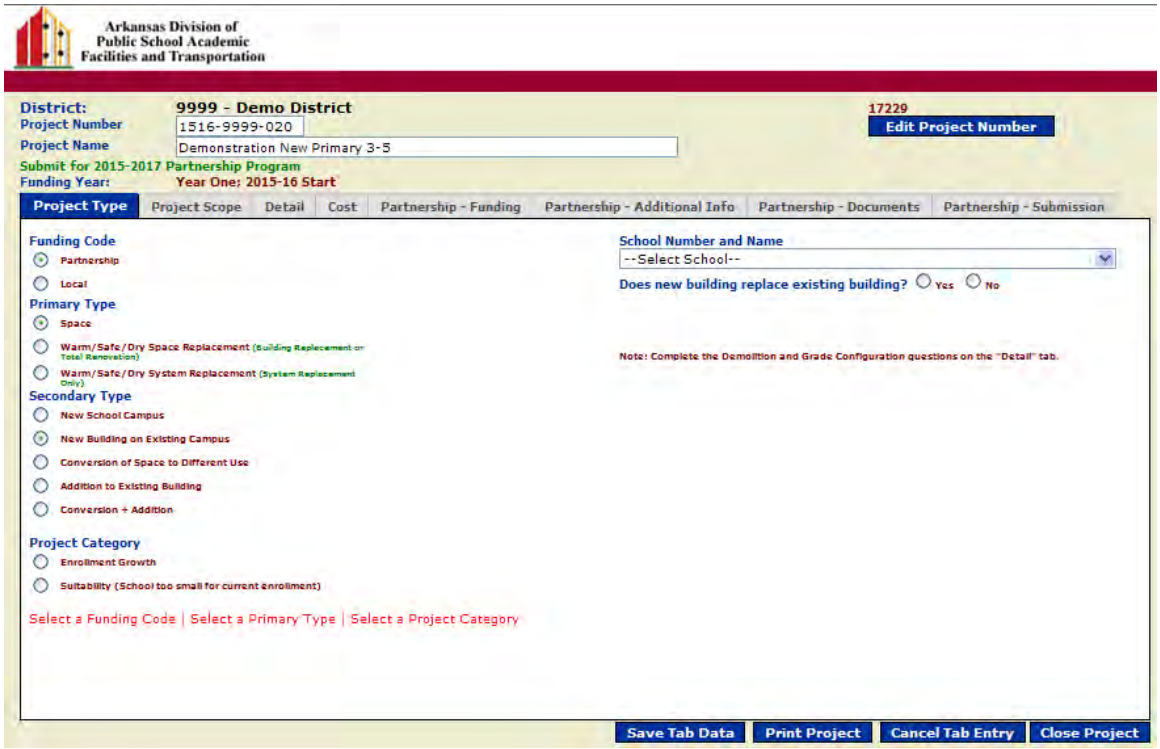
Project Type screen requires one type to be selected that best suits the project being created. If the user selects ◉ **Partnership** under the **Funding Code** heading and ◉ **Space** under the **Primary Type** heading, the user should proceed to the **Secondary Type** to make a selection. If the user selects ◉ **New School Campus** the user should answer **Does new school replace existing school?** ○ **Yes** ◉ **No** question as seen in the following screen.



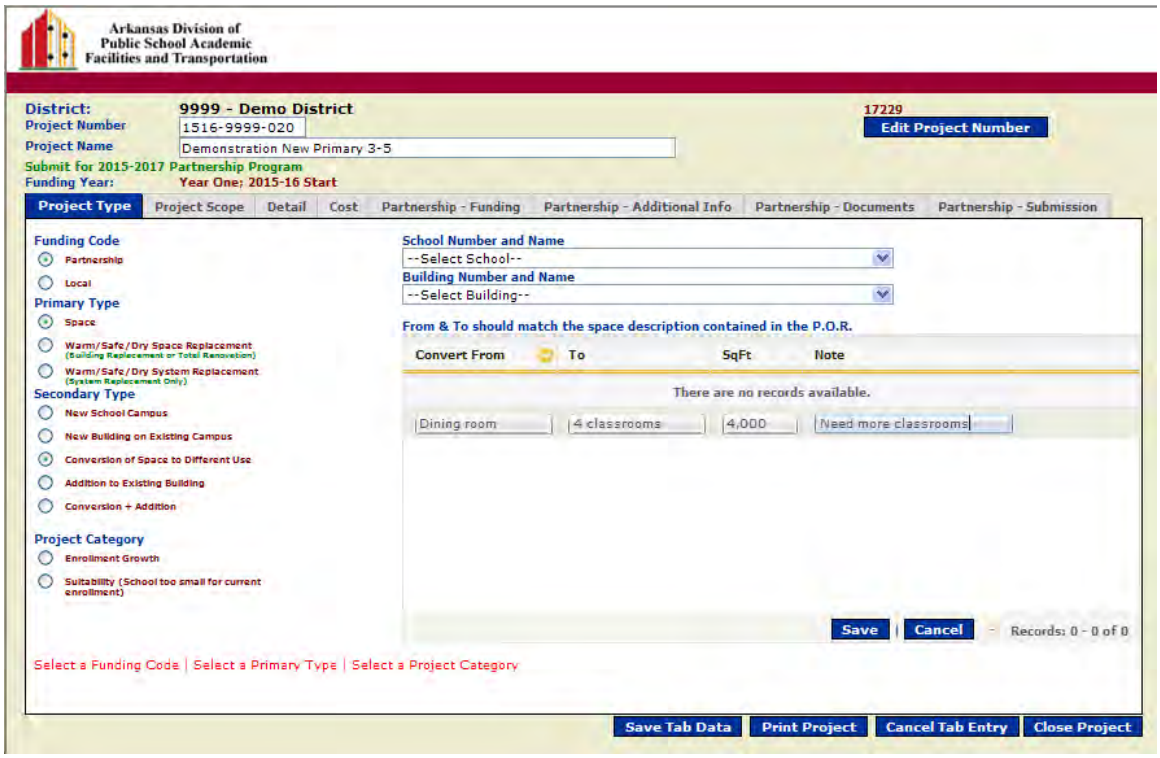
The user should follow and answer all the applicable questions related to the project.

If the ◉ **New Building on Existing Campus** is selected the user will be asked to identify the **School Number and Name** and answer the question **Does new building replace existing building?** ○ **Yes** ○ **No** as seen in the following screen.

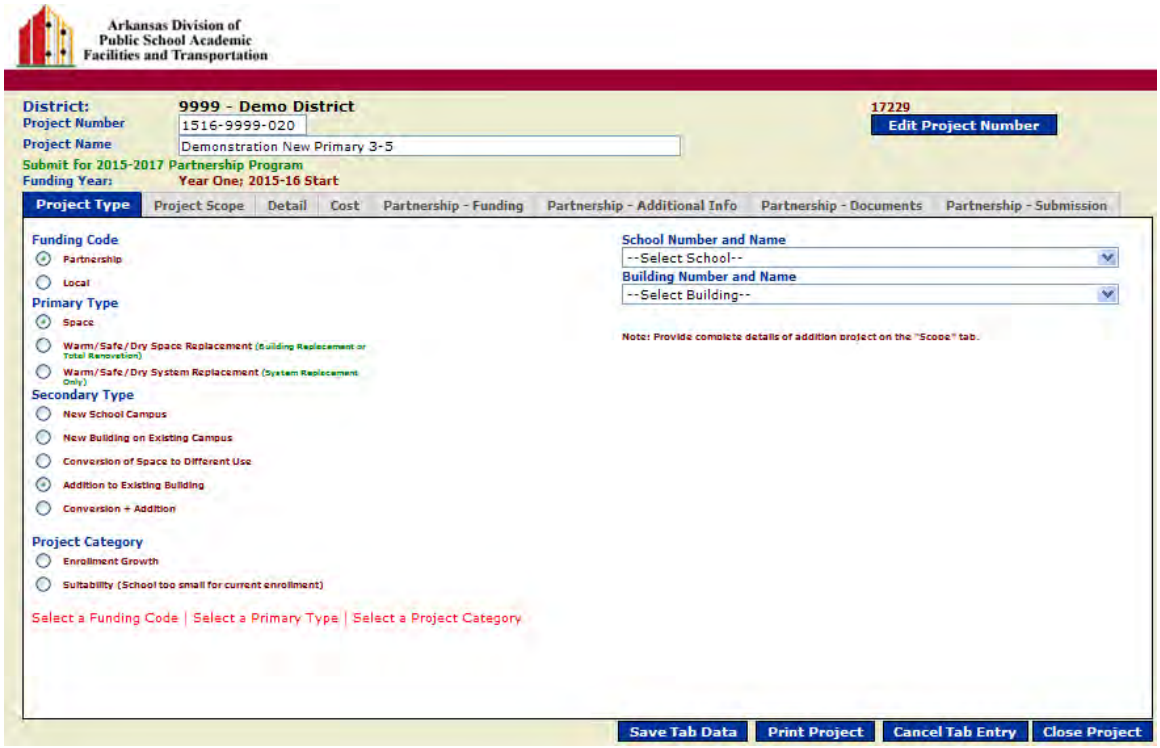
NOTE: THE USER SHOULD CLICK THE Save Tab Data BUTTON AFTER ALL DATA IS ENTERED INTO EACH SCREEN.



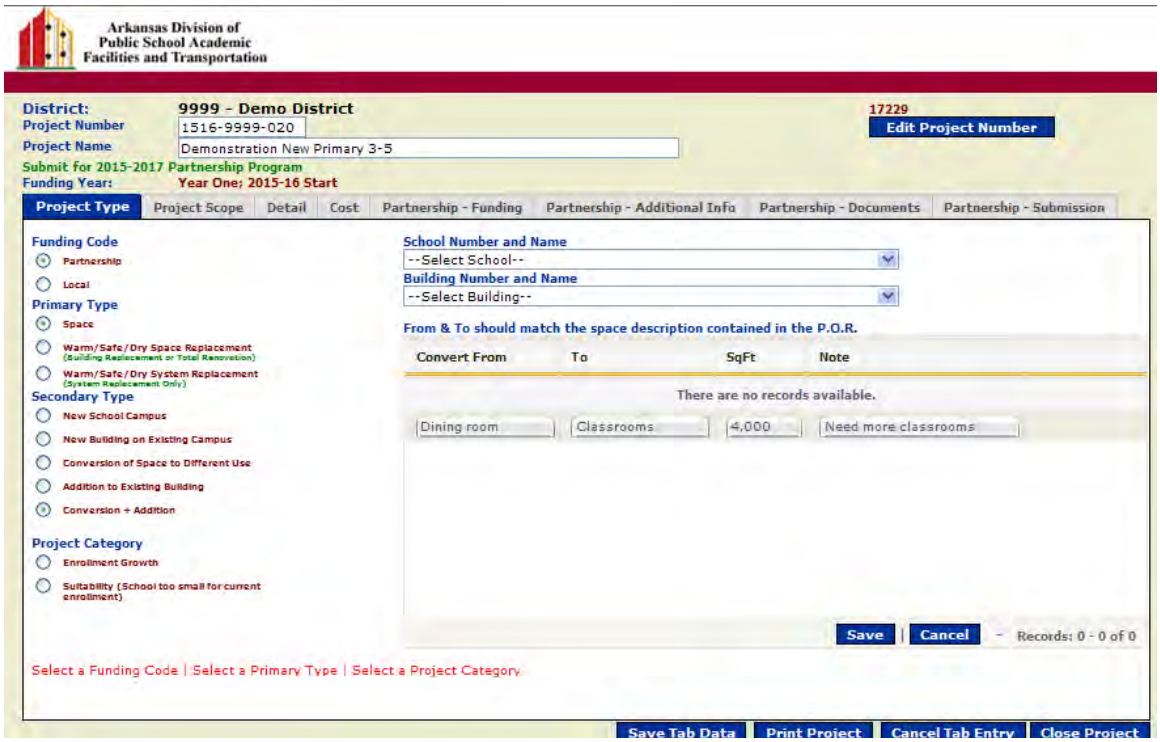
If the **Conversion of Space to Different Use** is selected the user will be asked to identify the **School Number and Name**, **Building Number and Name** and what the building is converting from and to, as seen in the following screen.



If the Addition to Existing Building is selected the user will be asked to identify the **School Number and Name** and **Building Number and Name** as seen in the following screen.



If the Conversion + Addition is selected the user will be asked to identify the School Number and Name, Building Number and Name and what the building is converting from and to, as seen in the following screen.

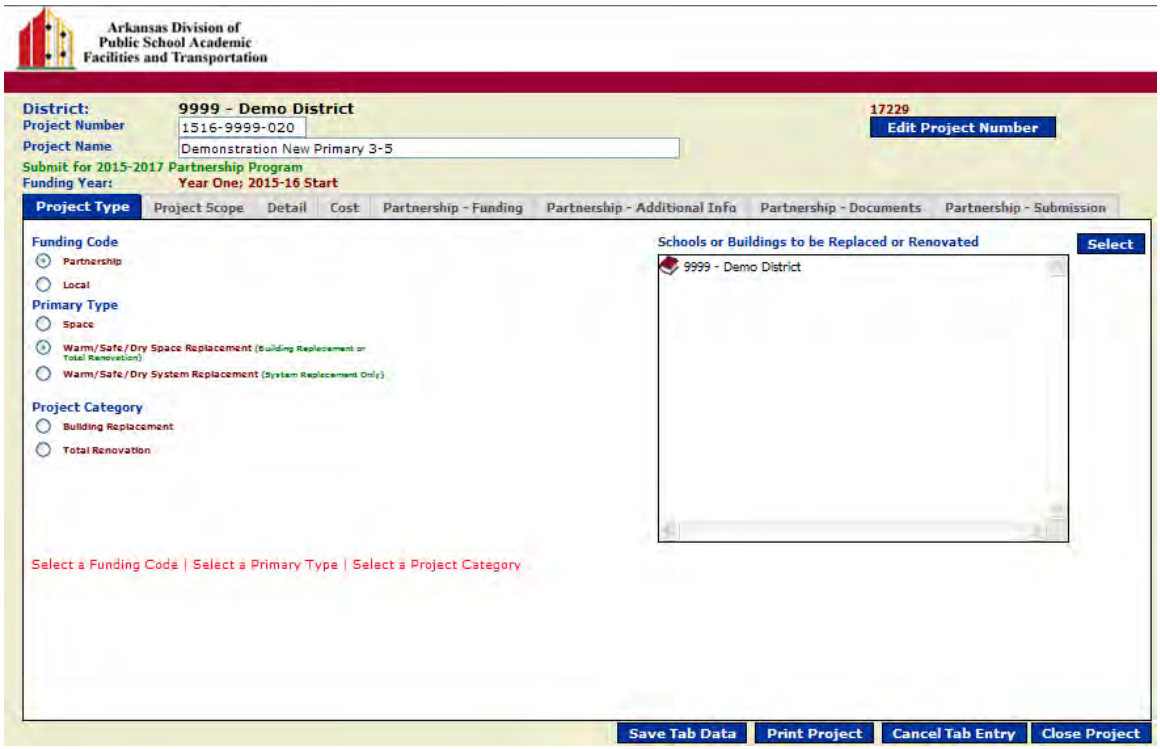


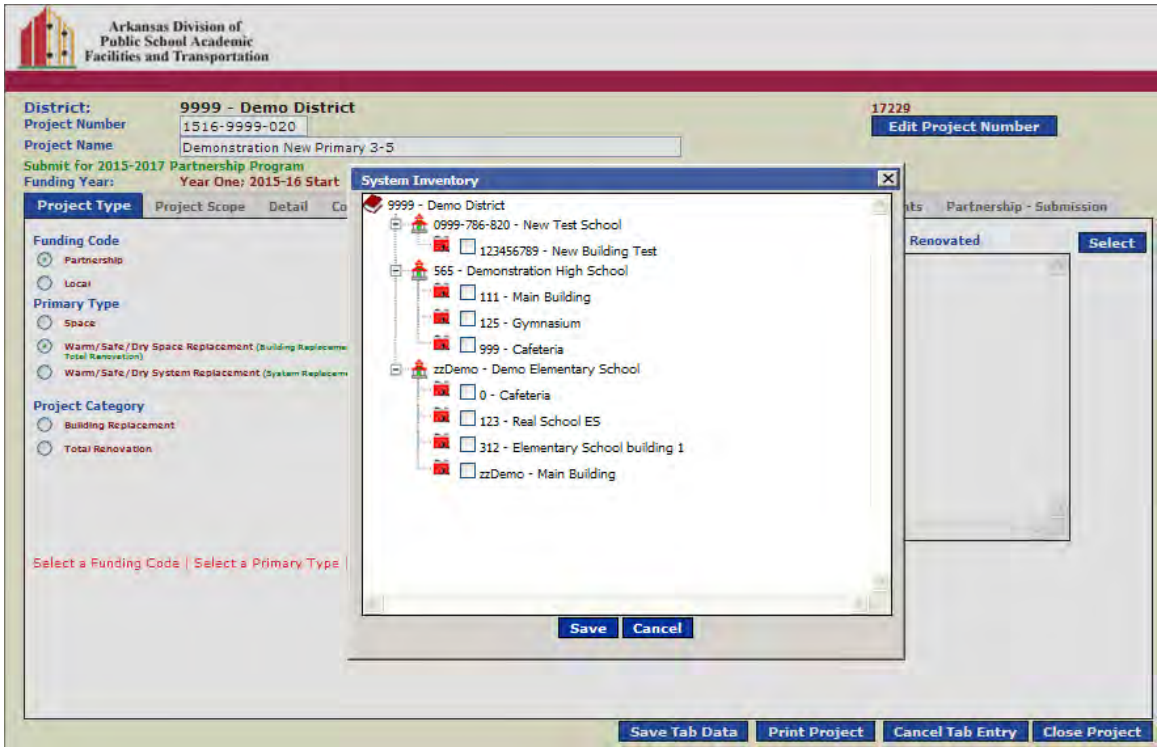
After selecting the Secondary Type the user should select the Project Category that best describes the project: Enrollment Growth or Suitability (School too small for current enrollment).

The user has two additionally categories under the Primary Type heading:

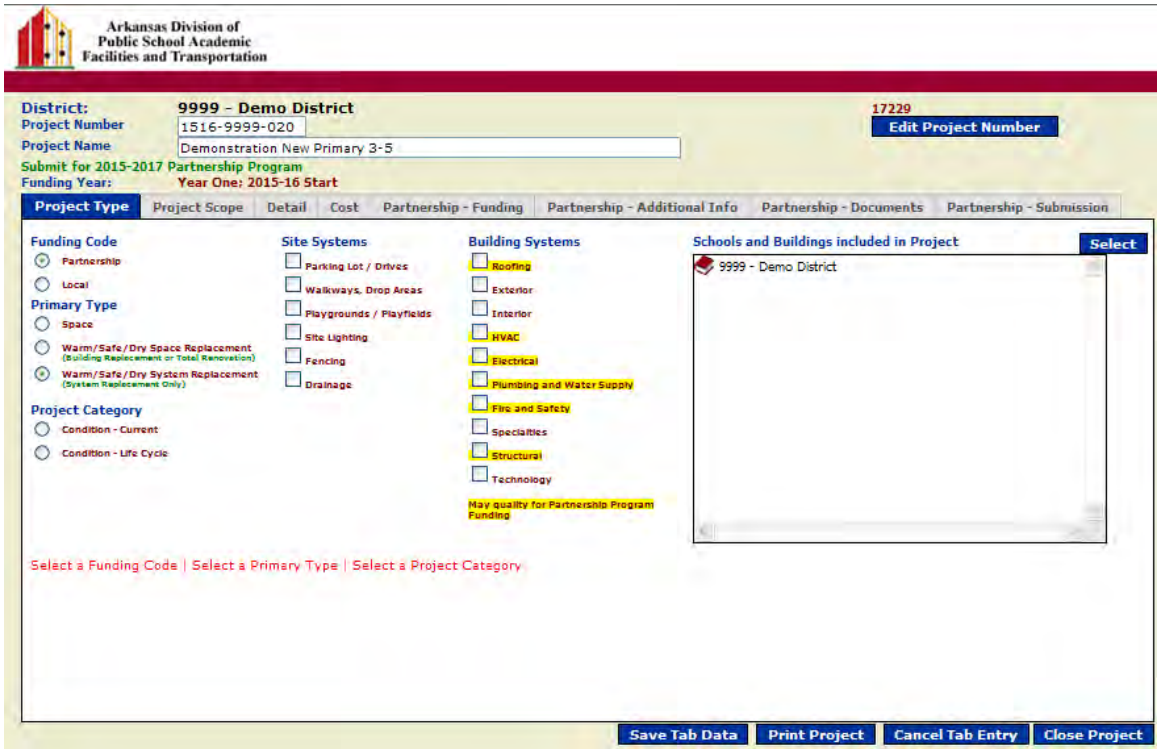
Warm/Safe/Dry Space Replacement (Building Replacement or Total Renovation) and Warm/Safe/Dry System Replacement (System Replacement Only).

If the user selects Warm/Safe/Dry Space Replacement (Building Replacement or Total Renovation) the user will be asked to identify the Schools or Buildings to be Replaced or Renovated by clicking on the Select button in the upper right corner. The user will select which school or buildings are applicable to this project and **click on the Save button in the upper right corner** to save the data entered as seen in the following screen.


Arkansas Division of
Public School Academic
Facilities and Transportation
District:
9999 - Demo District
Project Number
1516-9999-020
Project Name
Demonstration New Primary 3-5
Submit for 2015-2017 Partnership Program
Funding Year:
Year One; 2015-16 Start
17229
Edit Project Number
Project Type
Project Scope
Detail
Cost
Partnership - Funding
Partnership - Additional Info
Partnership - Documents
Partnership - Submission
Funding Code
Partnership
Local
Primary Type
Space
Warm/Safe/Dry Space Replacement (Building Replacement or Total Renovation)
Warm/Safe/Dry System Replacement (System Replacement Only)
Project Category
Building Replacement
Total Renovation
Schools or Buildings to be Replaced or Renovated
Select
9999 - Demo District
Select a Funding Code | Select a Primary Type | Select a Project Category
Save Tab Data
Print Project
Cancel Tab Entry
Close Project


Arkansas Division of
Public School Academic
Facilities and Transportation
District:
9999 - Demo District
Project Number
1516-9999-020
Project Name
Demonstration New Primary 3-5
Submit for 2015-2017 Partnership Program
Funding Year:
Year One; 2015-16 Start
17229
Edit Project Number
System Inventory
9999 - Demo District
0999-786-820 - New Test School
123456789 - New Building Test
565 - Demonstration High School
111 - Main Building
125 - Gymnasium
999 - Cafeteria
zzDemo - Demo Elementary School
0 - Cafeteria
123 - Real School ES
312 - Elementary School building 1
zzDemo - Main Building
Save
Cancel
Renovated
Select
Save Tab Data
Print Project
Cancel Tab Entry
Close Project

If the user selects Warm/Safe/Dry System Replacement (System Replacement Only) the user should identify all major **Building Systems** that will be affected by the project being entered. Those systems highlighted may be eligible for Partnership Program funding. The user should click **Select** button to identify the **Schools and Buildings included in Project** and **Save** button in the upper right corner to save the data entered as seen in the following screen.

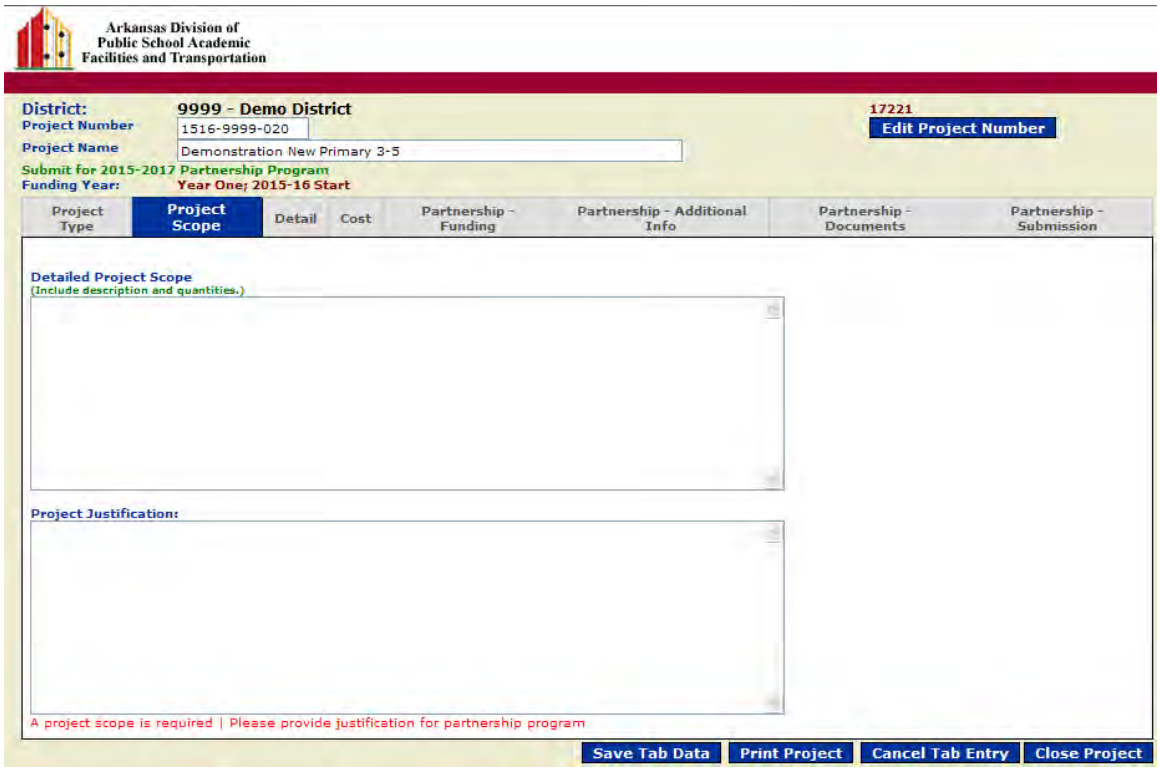


After the user has selected the **Primary Type** the user should select the appropriate **Project Category**: Condition - Current or Condition - Life Cycle. The user should click **Save Tab Data** to save the data entered.

If the district has indicated "Yes" for "Submit Project for 2015-2017 Partnership Program, an additional three tabs will be revealed. If the district is not applying for Partnership Program Funding in Fiscal Years 2015 -2017, only the **Project Type** tab, the **Project Scope** tab, **Detail** tab and the **Cost** tab need to be completed. (See the following instructions)

If the user selects **Funding Code** under the **Project Type** screen is Local the user will follow the aforementioned instructions for creating Partnership projects.

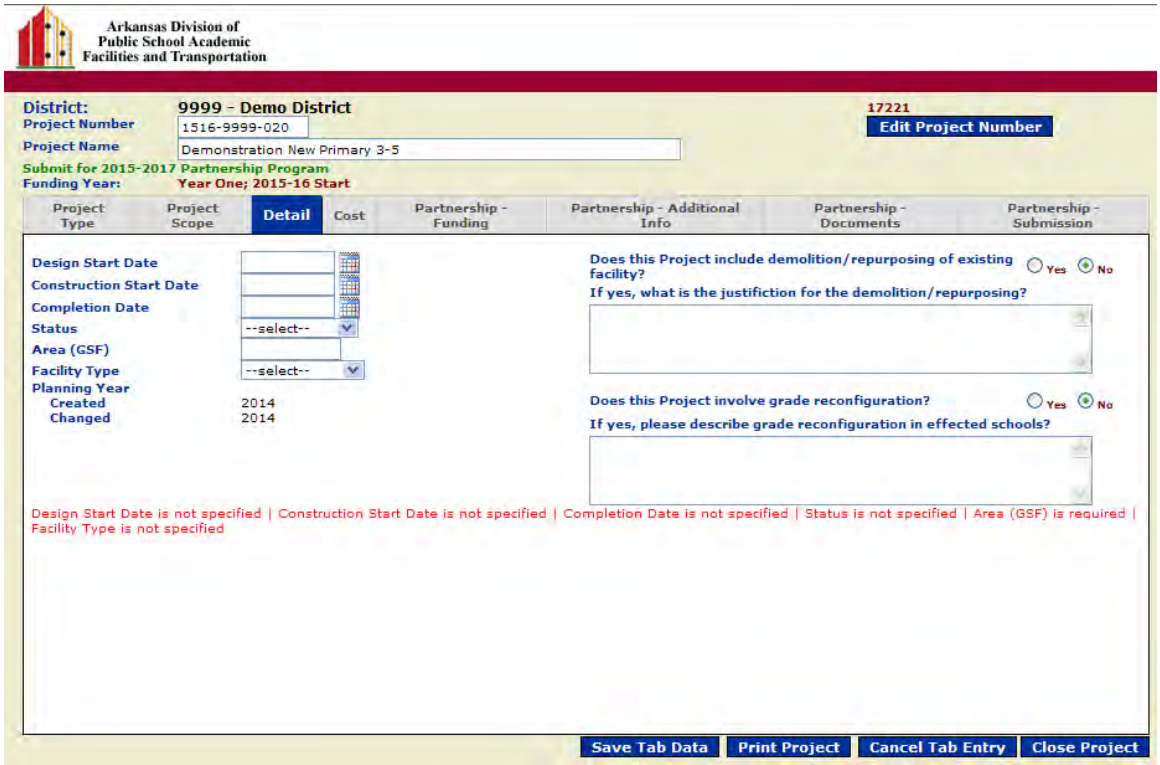
The user will proceed to the **Project Scope** screen. The user will provide a **Detailed Project Scope** (Include description and quantities.) and **Project Justification:** as seen in the following screen.



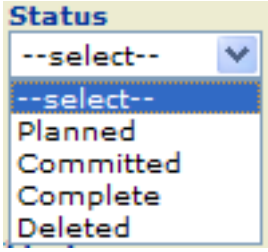
<u>Project Scope must be complete and must provide sufficient information so the Division can determine state financial participation.</u> Scope, Schematic and, if space project, POR MUST match.

The user will proceed to the **Detail** screen.

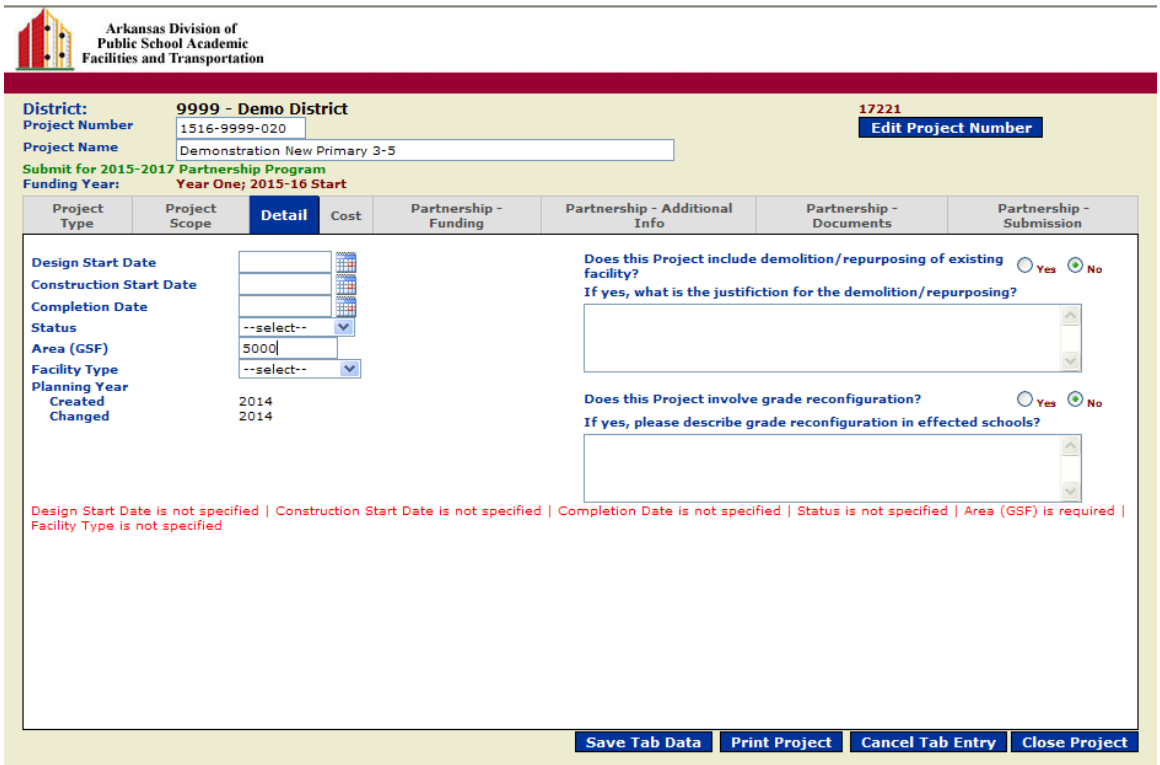
The **Design Start Date**, **Construction Start Date**, , and **Completion Date** are to be entered to identify expected time frames for the project. The Completion Date should be the estimated time of the final acceptance of the project. The button generates a calendar to ease the date entry for the user. District indicates whether there is a demolition/repurposing of the existing facility and the justification for demolition. District also indicates whether the project involves a grade configuration, and if so what schools and grade levels are affected as seen in the following screen.



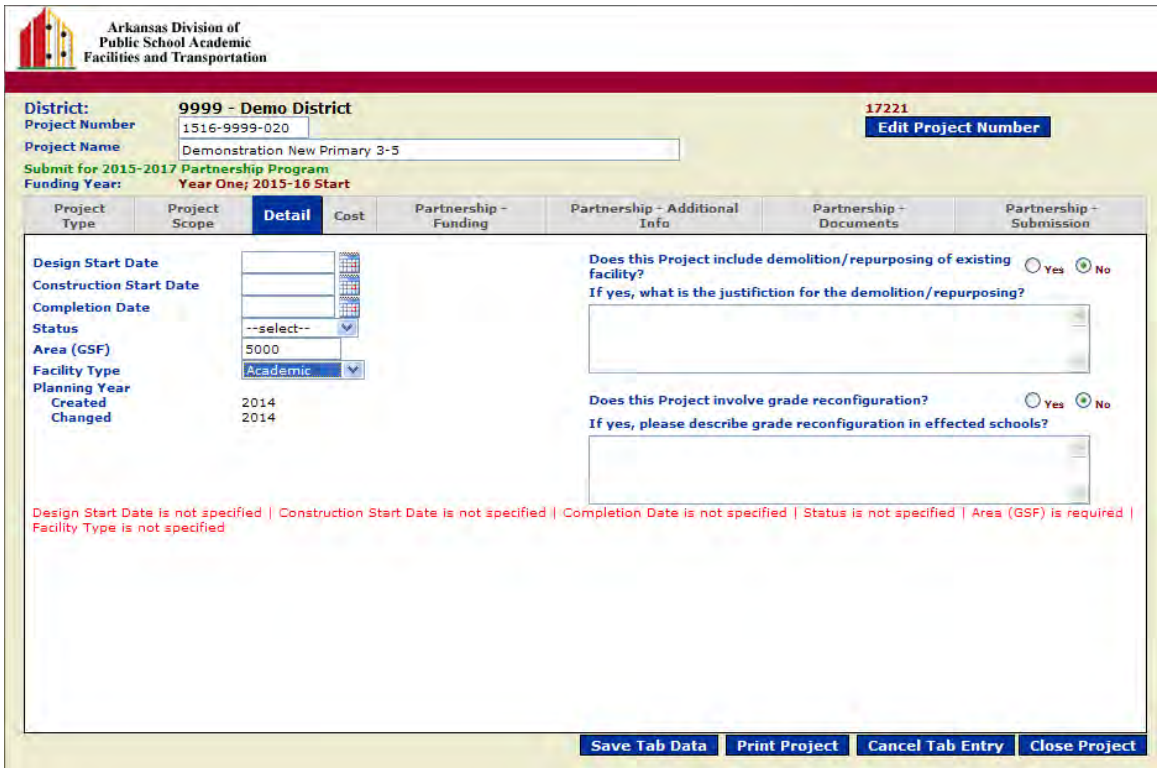
Status is a drop-down menu where the user must select a status for projects. A Partnership Program or self-funded project becomes a committed project when a School Construction Approval Form is submitted to the Division for the project. A complete project has construction completed, occupancy of the facility, and all state financial participation funds, if applicable, provided. All projects that are not committed or complete are planned. If you wish to no longer track a project, you may set its status to Deleted.

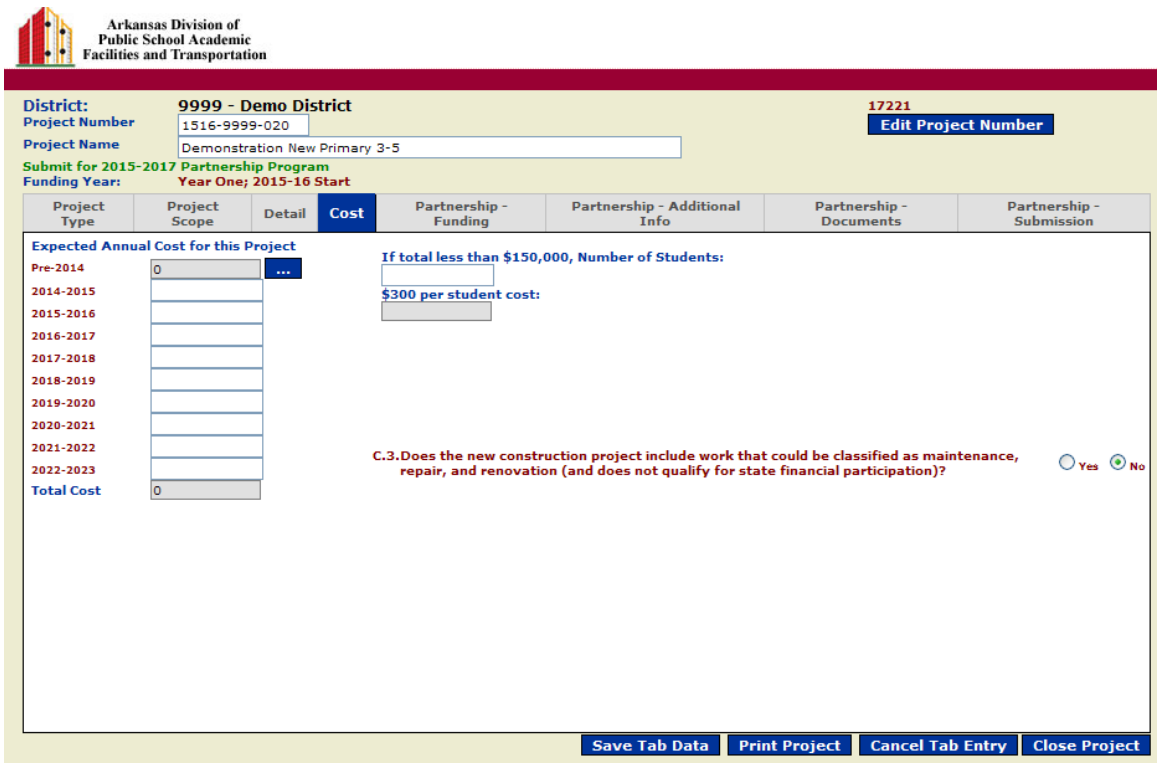


Area (GSF) allows the user to input the square footage of the project as seen in the following screen. Project area for new facilities or facility additions must meet spacing requirements contained in the Program of Requirements contained in the Arkansas School Facility Manual. For roof projects, enter the area of roof system being replaced.



Facility Type allows the user to designate the type of facility affected by the project (Academic or Non-Academic) as seen in the following screen.





The user should proceed to the **Cost** screen. The **Total Cost** is for the **total** estimated budget for the project, and will self-calculate after expected yearly expenditures are listed. Should the project fall in the $300.00 per student funding minimum, insert the number of students using on the campus where indicated. The minimum funding level will then be displayed

.

The Expected Annual Funding allows the user to input expected yearly total expenditures associated with the project that includes both district funding and state financial participation, if applicable. Pre 2014 expenditures, if any, should be added to the appropriate box (shaded).

If project contains work that could be classified as maintenance, repair, or renovation, which does not qualify for Partnership Program funding, indicate “Yes” on item C.3 and enter the approximate amount of non-fundable work as seen in the following screen.

Arkansas Division of
Public School Academic
Facilities and Transportation

District: 9999 - Demo District

17221

Project Number 1516-9999-020

Edit Project Number

Project Name Demonstration New Primary 3-5

Submit for 2015-2017 Partnership Program

Funding Year: Year One; 2015-16 Start

Project Type	Project Scope	Detail	Cost	Partnership - Funding	Partnership - Additional Info	Partnership - Documents	Partnership - Submission

Expected Annual Cost for this Project

Pre-2014	0	...
2014-2015		
2015-2016		
2016-2017		
2017-2018		
2018-2019		
2019-2020		
2020-2021		
2021-2022		
2022-2023		
Total Cost	0	

If total less than $150,000, Number of Students:

$300 per student cost:

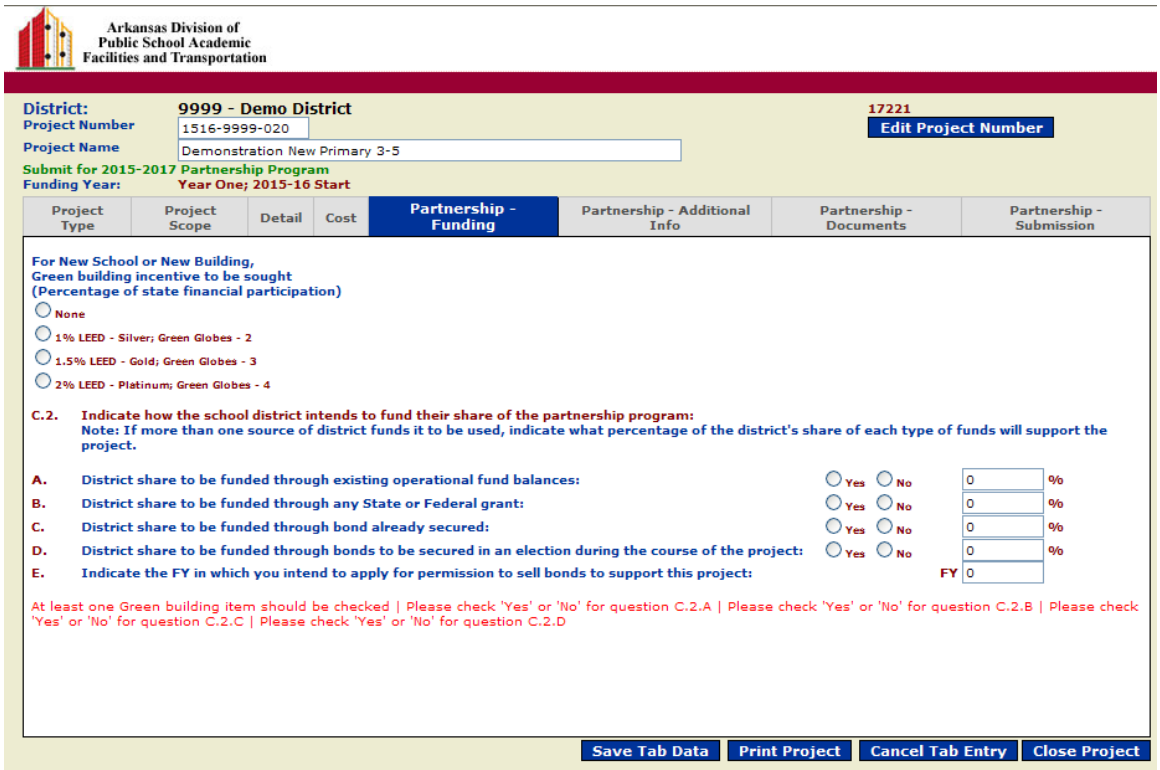
C.3. Does the new construction project include work that could be classified as maintenance, repair, and renovation (and does not qualify for state financial participation)? Yes No

If yes, please provide the allocation of project costs between new construction activities and maintenance, repair, and renovation activities below:

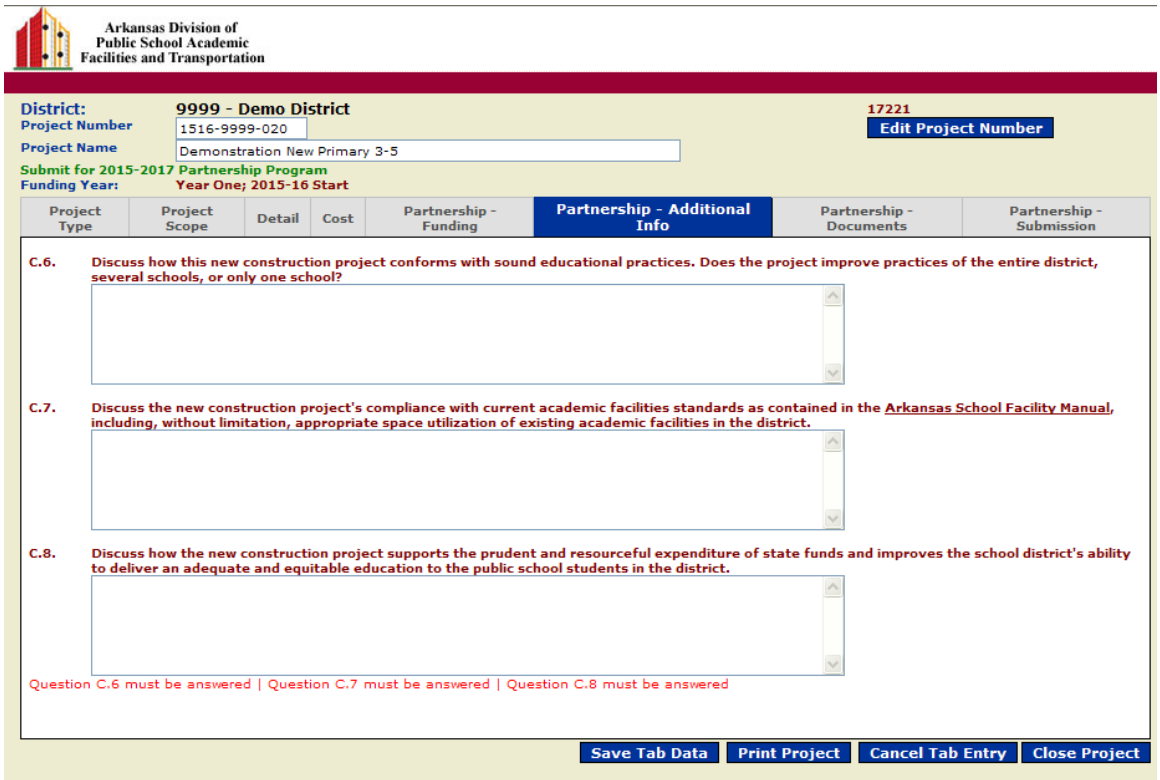
0 <---------- Total Maintenance, Repair, Renovation Costs contained in Total Cost (These costs ARE NOT eligible for state financial participation)

0 <---------- Total New Construction Costs contained in Total Cost (These costs ARE eligible for state financial participation)

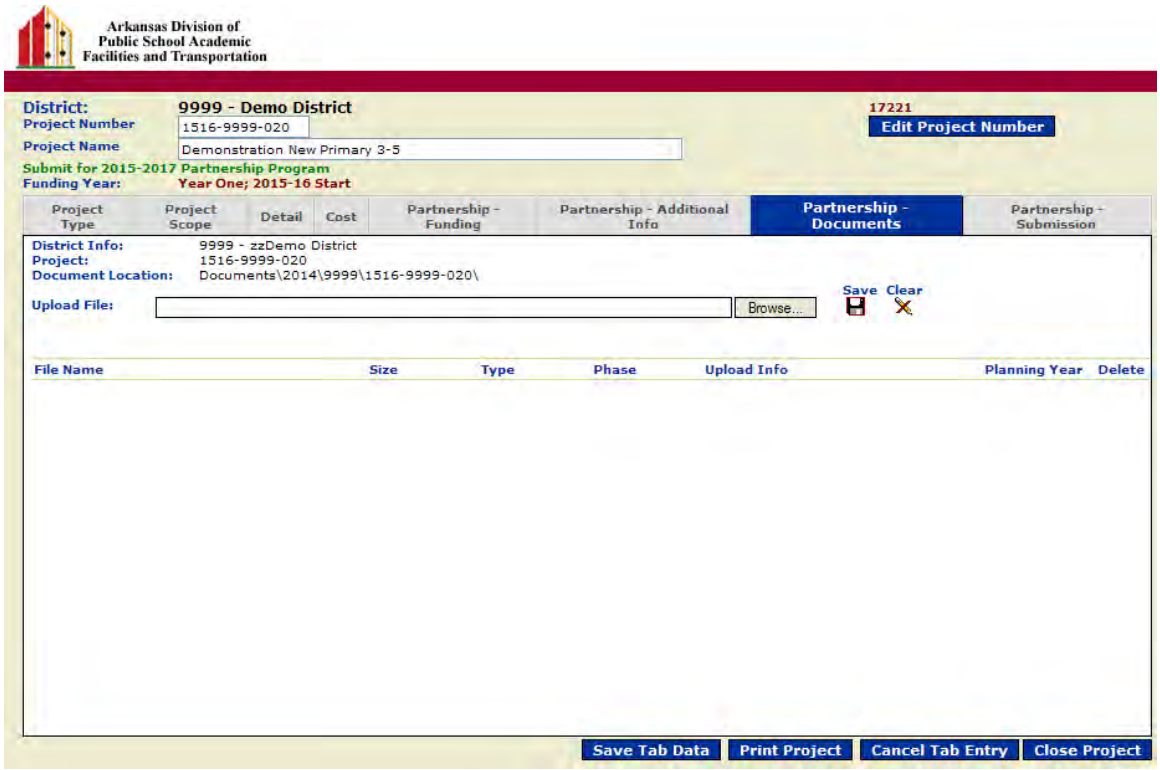
Save Tab Data | Print Project | Cancel Tab Entry | Close Project



On the **Partnership - Funding** screen districts indicate whether they are applying for LEED or Green Globes certification, and if so what level. Item C.2 A-E should be answered Yes or No to indicate how district will fund the district share of the project. The district should allocate the corresponding percentages(25 %) for each district share funding item. The percentage totals should equal 100%. Note that C.2.E requires districts to indicate what fiscal year the district plans to apply for permission to sell bonds to support the project (if any).



"On the **Partnership - Additional Info** screen items C.6 – C.8 need to be completed in sufficient detail to adequately address the required discussion.

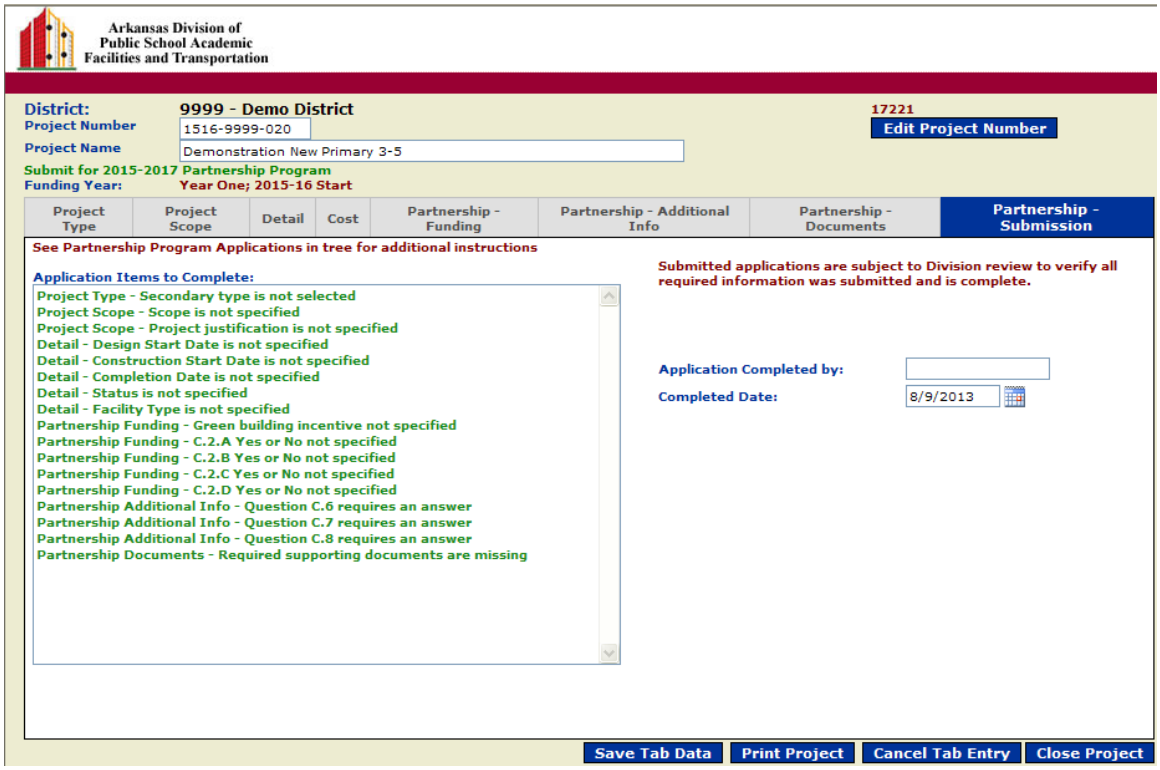


The **Partnership - Documents** page is where the district will upload required supporting Partnership Program project documents such as:

Schematics that meet requirements of Partnership Program rule Sections 3.30 and 7.02(i) must be uploaded. As indicated in rule 3.30 and 7.02(i), the schematic must indicate the gross sq. ft. of the project. Addition or conversion space project schematics must include labeled interior spaces with sq. ft. of each space. Warm, Safe, Dry (system) schematics must include gross sq. ft. of project and sufficient detail to evaluate the project and must include major system components and their placement. See above noted Partnership Program rules for further detail.

Upload completed POR (s), resolutions, schematics, etc. for space projects as noted in these guidelines.

IMPORTANT NOTE: FAILURE TO *FULLY AND ACCURATELY* COMPLETE ALL PARTS OF THE PARTNERSHIP PROGRAM APPLICATION INCLUDING WEB BASED PORTIONS AND DOCUMENT REQUIREMENTS MAY RESULT IN APPLICATION BEING DISQUALIFIED AS AN "INCOMPLETE APPLICATION".



This page above will list items that have no data entered and/or alert the user if NO uploads have been accepted. Projects may require multiple uploads, which will not be reflected on this screen if one upload has been accepted.

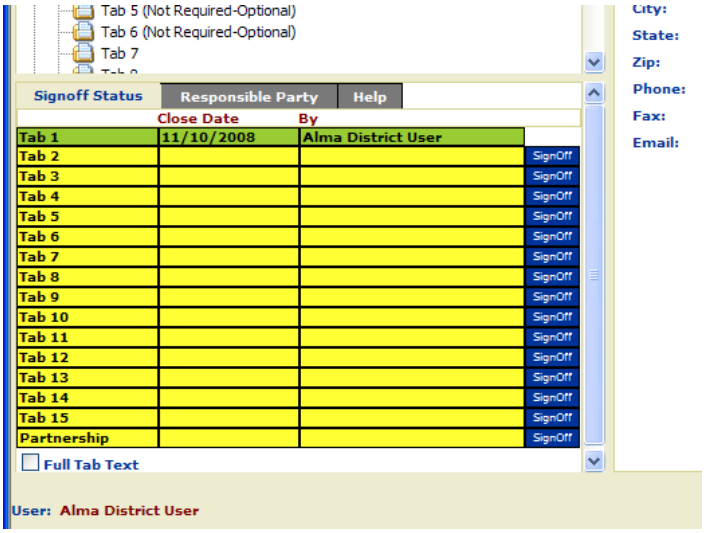
Upon clicking the **Save** button, the project input is complete. Project application, less uploads, can be printed by clicking on the Print Project button. If the user wishes to print uploads from the Web Tool, they must be printed separately. The user should also complete the **Application Completed by:** and the **Completed Date:** entries.

The district web tool main page will list all projects entered. Those with the 'hands shaking' icon ( )indicate a current Partnership Program application.
The user can edit any projects that have been created, but not submitted, by clicking on the button associated with that particular project entry until 03/01/2014. If an entered project is no longer needed, the user can return to the "Detail" screen and change the status to Deleted". Deleted projects will remain on the district projects screen, but will be marked as Deleted.

Sign-off Process

In the Sign-off pane on the lower left-hand corner of the page, there is a SignOff button associated with each Tab, as it corresponds to the Master Plan. The tool populates the Status, By and Date fields. See below:

After Signing Off:



This Sign-off process will be repeated for each tab as you complete entry.