

Instructions for Cost Estimate Cover Sheet and List of Required Documents

Instructions for Cost Estimate Cover Sheet: Numbers correspond to form

1. Construction Base Bid Cost Estimate: The basic construction cost for the project equals the total awarded new construction funding minus the following required SFB items and/or the optional District Desired Alternate items.
2. Construction Contingency: The SFB requires a percentage of the basic construction cost estimate to be set aside. Use 5% of Base Cost for construction up to 35,000 square feet and 3% above 35,000 square feet.
 - a. This contingency money can only be used for unknown and unforeseeable conditions such as: local permit authorities adding requirements, discovery of underground vaults or buried abandoned utilities; labor or material strike, etc. that occur after start of construction. Release of this money requires review and approval for funding by the SFB District Liaison.
 - b. All site-specific requirements and/or unforeseen site condition issues that fall over and above the formula amount for new schools are to be paid for from the project construction contingency until consumed.
 - c. With SFB District Liaison approval all remaining construction contingency funds can be used by the school district at the specific project site for a period of one year.
3. Architectural and Engineering, (A&E) Fees: Includes all aspects of consultants necessary for new construction design including: Architect, Electrical Engineer, Mechanical and Plumbing Engineer, Structural Engineer, Civil Engineer, Landscape Architect, Kitchen Planner, Acoustical Consultant Engineer, etc. Please refer to “Architectural Fee Guidelines” for the proper fee as a % of the base construction cost estimate
4. Other District Administrative Consultants, Project Managers, and/or Staff: Optional. These services are not required by the SFB and can only be used with approval of the Executive Director. These services are only to assist with the construction administrative tasks throughout the course of the project. The maximum value of the budget for this item that can be funded by the SFB shall be a percentage of the basic construction cost only, as computed by the following percentages:
 - a. 2½ % for the first \$1,000,000 of construction.
 - b. 1½ % for the next \$1,000,000 of construction or part thereof.
 - c. ½ % for the next \$6,000,000 of construction or part thereof.

5. Furniture, Fixtures & Equipment (FF&E): FF&E budget is 8% to 10% of the base construction cost estimate. The District is required to purchase all desks, tables, chairs, file cabinets, and 10 library books per student with these funds. **NOTE: ① or % @ current CPSF x SFB original approved sf, which ever is less**
- FF&E of 8.00% -- grades K-6 or 6.4% @ cur. CPSF ①
 - FF&E of 8.25% -- grades K-8 or 6.6% @ cur. CPSF ①
 - FF&E of 8.75% -- grades 6-8 or 7 % @ cur. CPSF ①
 - FF&E of 9.00% -- grades 7-8 or 7.2% @ cur. CPSF ①
 - FF&E of 10.00% -- grades 9-12 or 8 % @ cur. CPSF ①
6. Computers: SFB Guidelines require one computer be available for every eight students (Multi-media computer is required along with Network Servers, Hubs, CRT, Printers, Software Programs, etc.).
- General estimated cost is at a minimum of \$1,000 per computer times the number of computers to equal the 1:8 ratio.
 - Note: Computer equipment installation of the following; Hub equipment, racks, conduit, cables-circuits wiring, receptacles, device outlet boxes, provided circuit shall be wire tagged to indicate the circuit or switch number, etc. with all of the forgoing provided and installed under the Basic (Construction) Cost Estimate.**
7. Kitchen Equipment: Kitchen Equipment budget is 3% of the base construction cost estimate as a minimum budget amount. District may request waiver of requirements for an addition to existing school with kitchens. **NOTE: ② or % @ current CPSF x SFB original approved sf, which ever is less**
- Kitchen Equipment, fixed & all other miscellaneous items @ 3% of Base Cost or 2.4 % @ cur. CPSF ②**
8. Survey, Permits, Advertising, Printing, Etc.: An estimate for Construction Survey and Permits, Bid Advertising, Printing, and other Miscellaneous Costs is to be provided.
Note: Environmental site studies and original land survey are a part of the land purchase, and funded in land price.
9. Testing: Special Structural and Concrete Inspection, Geo-Tech Test and Inspection or other tests required by International Building Code (Uniform Building Code) are to be provided, budgeted and **REQUIRED SUBMITTAL TO SFB: New School Project - Required Construction funded, as necessary, as part of the project cost.**

Requirements for all New Construction Documents:

The following items must appear on all Transmittals, E-mail, Letters, all Drawing Document Sheet's Title Block, Specifications Cover, all Letters and documents sent to SFB during the Project Construction Phase including Change Orders, and Request for Payment.

- SFB Project No. (ex: 123456789-9999-001N)
- Full School District Name & Address
- New School grade level and a name

The above requirements shall be typed or printed in like manner equal to other portions of each document. The printing of required SFB information by hand shall not be acceptable on construction documents.

Other Documents to be Submitted for SFB Review and Approval

The SFB is to review and approve the Construction Document drawing. It is to be a 1/2 size drawing set of items 1-6 below. The drawing is to be Stamped (Sealed) and signed by the Architect of Record. One Electronic CD (compact-disk) file copy of architectural Site & Floor Plan sheets is also to be submitted in Autodesk 2004 format with bond files and no “x-ref” attachments, for the following completed sheets:

- a. AutoCAD copy of Architectural Site, Floor Plans & all Sections only; (Area P-line @ all building exterior / interior wall lines; label as (**Area P-lines Ext**) and (**Area P-lines Int.**). List room names and square footage for each, in each room on floor plans)
- b. Architectural Document Set: One complete set, half size set of drawing documents (*provide 1/2 size drawing document sheets*)
 1. Civil documents sheets: Site Plan, shall show the following: Original (existing) Site Survey, New Rough Grading Plan; each plan or survey shall be documented on an individual drawing sheet; do not combine plans for SFB review. (*provide 1/2 size drawing document sheets*)
- c. Sealed Specifications: One complete set, in print form only. Architect, Mechanical/Plumbing Engineer and Electrical Engineer must seal and sign set.
- d. Required to submit complete Construction Documents to governing authorities for Grading, Fire Marshal and Building Permit @ same time you submit to SFB
- e. Certification Forms: Certificates are to be signed by District Superintendent, Architect and Engineers of Record, and General Contractor (if using CM @ Risk or Design / Build)
- f. If Using a CM @ Risk or Design / Builder general contractor the following must be submitted:

CM @ Risk General Contractor

1. Provide *Cost Breakdown Form SFB NC 600- 06* and three original bids for each schedule-of-values item for review by SFB.
2. Copy of *Standard Form of Agreement Between Owner and Construction Manager* where the CM is the Contractor.
3. Copy of *Amendment No. 1* or Change Order that states or outlines the project and details construction documents and time allowed, and GMP = Guaranteed Maximum Price for construction.

Design / Builder General Contractor / Architect

1. Copy of *Standard Form of Agreement Between Owner and Design / Builder* where Contractor and Architect have comprise to act parallel under one agreement; that states or outlines the project & details construction documents and time allowed for each phase, and GMP = Guaranteed Maximum Price for construction.
 2. Provide *Cost Breakdown Form SFB NC 600- 06*; & three original bids for ea. schedule-of-values item for review by SFB.
- g. Energy Efficiency & Sustainability Form: *Form SFB NC 620-06*: Submit completed form sealed, dated and signed by qualified Registrant Professional Engineer in the appropriate field that directly supervised the work indicated on the form.
 - h. Project Information: Please complete the following information.

Architect & Engineers of Record: List name, Full License Number, and contact information of Architect & Engineers of Record to sign for this project (print in ink)

Name	AZ Full License #	Phone	Email address
Architect			
Civil Engineer			
Structural Engineer			
Mechanical / Plumbing Engineer			
Electrical Engineer			

General Contractor or CM @ Risk, or Design / Builder

Firm Name	AZ Full License #	Phone	Email address

General Building Materials as noted, print in ink)

Types of Roofing & Sub-Deck , Framing (Requires 15 year warranty, min.)	
No. of Building Stories	
Exterior wall surface & Support structure	
Interior Load Bearing wall structure	
Mechanical HVAC systems type (s)	

Other New Construction Information

General SFB Staff Policy: Staff requires a minimum of 4 weeks prior to the SFB Board Meeting to review the project plans and specifications; Staff may require additional time to review budgets. This review will be required to either establish or change any district proposed bid criteria. Once the District plan is approved by the SFB, Districts shall not make any changes to the proposed bid or GMP criteria without additional SFB approval. If changes to bid or GMP documents are required, a complete re-submittal to staff and SFB Board is necessary.

- a. SFB approved construction square footage and the estimated budget shall be the criteria by which construction documents are reviewed by staff for bidding or GMP approval to receive SFB Funds.
- b. After the SFB has approved construction square footage with an estimated project budget, the District is 'locked' into these numbers.
- c. Any changes made by the District from the approved numbers without a re-review by staff and a reassessment of the project are not permitted.
- d. Districts may not receive bids or award contracts for less construction square footage than the original bid or GMP documents signified.

Staff Recommendation to the School Facilities Board for Bid / GMP Approval

After analyzing the District's design and ADM projections, staff will usually recommend the District be approved to proceed with the final bid or accept the GMP = Guaranteed Maximum Price, for this project subject to the following:

- a. The construction award approval is subject to the project's final bid or GMP that includes all site-specific requirements; coming in at or below the SFB approved project budget amount (SFB fund amount) with a favorable bid review and authorization of this project by SFB Staff.
- b. (If Applicable) School District Board shall provide a Resolution that gives SFB assurance that the district has local funds in the amount to cover their portion over the SFB budget and that it is set aside and available exclusively for this project.
- c. (If Applicable) Fire Marshal's Certification that installed, SFB funded, Water Tank is adequate to provide fire protection at the listed school facility.
- d. The School District shall provide Staff a copy of the final Grading, Fire Marshal, and Building Permits as required / Authorized by the City, County, or other Local and/or State Building Department Authority.
- e. Provide final PDF (specification) copy, and PDF (document drawings) copy for Permanent Archive set of Signed & Sealed Construction Documents used to obtain the permit, placed on electronic compact disk = CD; refer to paragraph 12 below.
- f. The District shall acknowledge that all future changes to the construction contract shall require a signed Change Order authorized by the School District, Architect of Record, CM @ Risk (General Contractor) and submitted to the district's SFB Liaison for review / approval by the School Facilities Board, Prior to The Work Being Performed.

Items required for New Construction Funding:

Please note that the following shall become part of the School District’s requirement to receive SFB funding and be provided to the SFB Staff at the beginning of Project Construction: The Applicant agrees that any negotiations, agreements, and/or contracts between the Applicant and architect(s) for the design of the new school shall provide that the Board retains the right to full and complete CD electronic **PDF** copy (CD = electronic compact-disk) of the Sealed & Signed Construction Documents (drawings and specifications) used to obtain the building permits; for the following restricted purposes:

Note: All documents must be Sealed and Signed by the Registrant that prepared or under whose direct supervision each document was prepared within the category involved. (Refer to Arizona Revised Statutes, Title 32, Chapter 1; 32-125. Seals for registrants; 32-130. Review of drawings, plans or design specifications by public agencies; 32-142. Public Work)

- a. To provide a Permanent Archived set of Construction Documents for all State of Arizona funded school projects.
- b. To acknowledge Architects and their School Designs that where successfully funded by the State of Arizona School Facilities Board.
- c. To create a collection of promotional architectural designs for elementary, middle and high schools that will be available to other school districts to use as a school design resource; to acquaint school district with and to promote Arizona Architects that have previously designed successful school facilities.

Note: It shall be unequivocally understood that other school districts cannot use the Applicant’s design plans as their own as mandated by Code and Rules under the Arizona State Board of Technical Registration and copy right laws of Arizona. Artistic representations that will be available to the general public and/or school districts, shall not contain confidential nor proprietary information, but shall include professional credit for the Architect and Engineers of the previously successful project.

Maximum number of buildings and square feet to be funded by the SFB

The SFB approved this policy in November 2006 limiting the number of buildings and lineal feet the SFB will fund.

Number of buildings the SFB will fund based on the total square footage of the school:

Square feet	0 – 60,000	60,000- 125,000	125,000- 170,000	170,000- 240,000	240,000 +
Number of Buildings	1	2	3	4	5

Allowable minimum lineal feet.

Building Size	Lineal Feet Allowed
Under 60,000 sq. ft.	1,600
67,669 sq. ft.	2,466
73,953 sq. ft.	2,578
101,640 sq. ft.	3,020
134,869 sq. ft.	4,260

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