QUALITY SCHOOLS GRANT PROGRAM

**APPLICATION FOR
QUALITY SCHOOLS PROJECT GRANTS
FOR THE 2019 BIENNIUM**

MONTANA DEPARTMENT OF COMMERCE

301 S Park Avenue
PO Box 200523
Helena, Montana 59620-0523
Phone: (406) 841-2770
Fax: (406) 841-2771

Website: comdev.mt.gov/Programs/QualitySchools

Applications must be postmarked on or received by
March 1, 2016

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QUALITY SCHOOLS GRANT PROGRAM

The Quality Schools Grant Program (Quality Schools) is a state-funded grant program administered by the Montana Department of Commerce (the Department), which provides financial assistance to K-12 public schools in order to improve upon their facilities and enhance learning opportunities for students. For more detailed information about what the Quality Schools Program has to offer, refer to the *Quality Schools Grant Program Application Guidelines and Administration Manual – Projects (2019 Biennium)* or the program website at http://comdev.mt.gov/Programs/QualitySchools.

Eligible Applicants
Any Montana K-12 public school district may apply for a grant award under the Quality Schools Grant Program. Schools may apply for only one project per LE # (district). Each application may contain only one project proposal.

Eligible Projects
Eligible projects for Quality Schools funds include construction of a new school facility; major repairs or deferred maintenance to an existing school; major improvements or enhancements to an existing school; or information technology infrastructure, including installations, upgrades, or improvements, to an existing school. Department staff will review Quality Schools project grant applications for both technical and financial feasibility, and the extent to which the proposed project relates to each of the six statutory priorities and five statutory attributes set forth in Section 90-6-811, MCA. The Department will rank projects according to the Statutory Priorities for school facility projects in the listed order of priority giving preference to school facility projects involving repairs to existing facilities over projects involving construction of new facilities (§ 90-6-811(1), MCA). The Department may also adjust its rankings based on the educationally relevant factors established in Section 20-9-309, MCA.

Types of Financial Assistance
The Quality Schools Program provides grants for facility projects, planning, and emergency situations. **This application is for PROJECT GRANTS only.** For information regarding planning and emergency grants available through the Quality Schools Program, visit the Department's website at comdev.mt.gov/Programs/QS/PlanningGrants/Overview, e-mail the Quality Schools Program Team at DOCQualitySchools@mt.gov, or call (406) 841-2770.

Application Submission
1. Completed applications must be **received by the Department or postmarked on March 1, 2016.**
2. **Send one (1) printed hardcopy** and **one (1) electronic copy** (CD, or email submission if the file size permits).
3. Please send your completed application to:

   Community Development Division
   301 S Park Avenue
   PO Box 200523
   Helena, Montana 59620-0523
   DOCQualitySchools@mt.gov

4. A District that previously submitted a project grant application in 2014 that was considered for funding during the 2015 legislative session for 2017 Biennium funding, can submit a letter to the Department of Commerce no later than March 1, 2016, requesting the Department include the previously submitted application as part of the March 1, 2016 Quality Schools application pool. These applicants can also submit updated or new information to be considered during the ranking process; this information would need to be submitted with the letter and no later than March 1, 2016. Substantial changes to the project will require a new application from the District that would need to be submitted no later than March 1, 2016 and follow all of the application requirements. Please contact the Quality Schools staff for more information.

Applicants are encouraged to contact Quality Schools Program staff with any questions they have concerning application submittal and requirements related thereto. The Montana Department of Commerce is committed to assisting all school districts applying for Quality Schools grant funding.

The Quality Schools Application Guidelines and Administration Manual provides detailed information about the program and all of its requirements. It is important that potential applicants obtain a copy of the guidelines in order to be aware of the requirements of the program and expectations of Quality Schools applicants. **The Quality Schools Application Guidelines and Administration Manual describes and provides templates of other items that must be completed and submitted along with the Application.**

INSTRUCTIONS FOR COMPLETING THE
2019 BIENNIUM QUALITY SCHOOLS PROGRAM
PROJECT GRANT APPLICATION

SECTION A – PROJECT INFORMATION

1. <u>NAME OF SCHOOL DISTRICT</u>: Enter the name and LE number of the school district submitting the application. If the project will involve a facility used by more than one LE, please enter all LE numbers that will be involved in the project and the percentage attributable to each. Please submit only one application per LE.

2. <u>COUNTY</u>: Indicate the county in which the school district is located.

3. <u>STATUTORY PRIORITY</u>: Circle one of the statutory priorities under which the proposed project is best suited. Refer to the descriptions in Chapter 1 of the <u>Application Guidelines and Administration Manual</u> for descriptions of the types and priorities of projects that are eligible for financial assistance. If the proposed project could be applied for more than one priority please also explain in the Project Summary section how and to what extent the project meets other priorities as well.

4. <u>TYPE OF PROJECT</u>: Briefly identify the type of project being proposed. For example, High School boiler replacement, district-wide roof insulation, water treatment, etc. Please submit only one project per application. However, in some cases, there are multiple related projects being proposed at the same time (e.g., replace roof insulation as part of new roof installation). If this is applicable to the project being proposed for grant funding, please include an explanation of why it would be more efficient or cost effective to pursue multiple related projects at the same time.

5. <u>TOTAL PROJECT COST</u>: What is the cost of the project as a whole? Include all phases from start to completion. This total should include the proposed Quality Schools funding as well as all other costs to complete the project. This should include all grant administration and personnel costs.

6. <u>QUALITY SCHOOLS FUNDS REQUESTED</u>: Indicate what amount of the total project cost the applicant is requesting be funded with Quality Schools project grant funds.

7. <u>DISTRICT SUPERINTENDENT (OR AUTHORIZED REPRESENTATIVE)</u>: Enter the name, title, email, mailing address, business telephone, and fax number of the District Superintendent or authorized representative for the applicant district.

8. <u>PRIMARY CONTACT PERSON</u>: If different than the individual listed above, provide the name, title, email address, mailing address, business telephone, and fax number of the person designated as the primary contact person for the applicant district. The primary contact person will serve as the district's liaison with the Department for the duration of the grant. This person should be knowledgeable about the proposed project, and be authorized by the district to speak on behalf of the applicant regarding the application. Please also indicate whether this individual is authorized to sign official documents relating to the grant, such as requests for payment and reporting forms.

9-11. <u>OTHER CONTACT PERSONS</u>: If applicable, provide the name, email address, mailing address, business telephone, and fax number for any persons listed for items 9 through 11. These are the key persons who would be involved in the administration of the proposed project. If additional space is needed, please attach pages as necessary. Please also indicate whether any of these individuals are authorized to sign official documents relating to the grant, such as requests for payment and reporting forms.

12. <u>PROJECT DESCRIPTION</u>: Briefly and concisely summarize the problem that will be addressed by the proposed project. **Refer to the Application Guidelines and Administration Manual for specific information or detail requested for each priority.**

(a) <u>Summary of Project:</u> Summarize the specific problem(s) addressed by the project, how the proposed project will solve the problem(s), and what will be accomplished. **This should be concise and give a clear idea of what the applicant proposes to do with Quality Schools funding.** The summary should list all specific district **facilities and facility components** that will be involved in the project, and provide some **background information** about each, including: the age of the facility or facility components; the date, type and cost of the last major improvements to the facility or facility components.

(b) <u>Statement of Need:</u> What need or problem will be addressed by the receipt of a Quality Schools project grant? If applicable, explain the cause of the problem and its effects on the district. Include any data, photographs, reports, studies, or expert views that confirm the existence of the problem. Include copies of all supporting documentation with the application. **Lack of documentation of a problem will result in the application being scored at a lower level, or being rejected for further review.** Explain the importance of the proposed project and why the applicant should receive funding at this time. Explain why the proposed project is the best solution to the stated deficiency and how the applicant came to that decision.

(c) <u>Statutory Priority:</u> Indicate which statutory priority the project meets. (Section 90-6-811(1), MCA.) List any additional priorities the project meets, and use the space provided to explain how and to what extent each priority is met. **Refer to Chapter 1 of the Application Guidelines and Administration Manual for specific details on what is needed to meet each priority.** Be sure to address all aspects of the selected priority. If additional documents are needed to further validate how or to what extent the project meets each priority, please include copies of those documents with the application.

(d) <u>Statutory Attributes:</u> Describe how the project meets each statutory attribute. (Section 90-6-811(2), MCA.) Explain how and to what extent each attribute has been met by the applicant district. **Refer to Chapter 1 of the Application Guidelines and Administration Manual for specific details on what is needed for each attribute.** Address all aspects of the selected attribute(s) as listed in the guidelines. If additional documents are needed to further validate how or to what extent the project meets each attribute, please include copies of those documents with the application.

(e) <u>Educationally Relevant Factors:</u> Indicate which of the educationally relevant factor(s) set forth in § 20-9-309, MCA, if any, should affect the Department's ranking of the applicant's proposed project. (Section 90-6-811(3), MCA.) Check the box beside each applicable factor and use the space provided to explain why each factor should be considered. **Refer to Chapter 1 of the Application Guidelines and Administration Manual for specific details on what is needed for each factor.** Address all aspects of the selected factor(s). If additional documents are needed to further validate how or to what extent the project meets the identified factor(s), please include copies of those documents with the application.

SECTION B – GRANT MANAGEMENT

If the district plans to contract with an outside firm or consultant for grant management services, provide an explanation of the district's decision to work with a grant administrator. For example, the district may not have the staff available to provide adequate administration of the Quality Schools grant.

SECTION C – FINANCIAL INFORMATION

1. PROPOSED FUNDING SOURCES: Using the form provided, list **all sources of funds** the applicant district intends to obtain and use to finance the proposed project (e.g., federal or state school funds, loans, bonds, cash reserves, donations, etc.), identify the location of all such funds, and whether or not such funds are currently available to the district. The sources of funds listed should equal the estimated total project cost. For each source of funding listed, state the **type** (grant, loan, contribution, or other), the **amount** of funds from each type, and the **status of the commitment** of those funds to the project at the time of writing this application, using one of the following choices:

- **No Contact:** No contact has yet been made with the proposed funding source;
- **Discussed:** Proposed source of funds has been discussed by the applicant district, but no application has been submitted or election called. Briefly describe the discussion with the funding source and the likelihood of obtaining the funds;
- **Application Submitted:** An application has been submitted or election called, but funding has not yet been secured. Briefly describe status of the application or election; or
- **Funds Committed (date):** Funds have been committed by the funding source or electorate. Attach a copy of the commitment letter or other documentation verifying the commitment of funds.

For each source of funds identified, describe any **specific conditions**, limitation, or requirements on the receipt or use of the funds for the proposed project, including all rate and terms likely to be required by any lenders or bond underwriters as a condition of obtaining the funds (e.g., interest rate, number of years to repay loan, and coverage and reserve requirements).

Finally, identify or estimate **when each source of funds will be available** to the district.

2. FUNDING STRATEGY NARRATIVE: Provide a funding strategy narrative that discusses the proposed funding sources identified above. Each question should be addressed individually.

   (a) Provide any additional information about the specific conditions of any identified funding sources;

   (b) Provide any additional information about when each source of funds will be available to the district, including, if applicable and available, any application due dates, deadlines for funding to be approved, when the funds would likely be available to the applicant, and whether any interim funds are available and/or likely to be used;

   (c) Describe how the applicant district envisions the coordination of all sources of funds for the proposed project, including the relationship of the project implementation schedule to the estimated timeframe for securing each source of funds;

   (d) Explain the applicant's districts plans or strategy to obtain alternative funding any of the sources of funds identified above are not secured by the district (e.g., the applicant will re-apply to the funding source, the applicant is willing to increase the amount of debt it will incur, or will the project not move forward).

3. PRELIMINARY PROJECT BUDGET: Using the form provided, prepare a preliminary project budget. This preliminary budget must include a breakdown of all major project costs and a description of the sources and uses of all funds for each type of costs. Each line item of the preliminary project budget should be designated as either "Quality Schools Eligible Costs" or "Other Costs," and the specific funding source and amount for each identified. Each line item in the preliminary project budget must qualify as an eligible expenditure under the particular funding source indicated. Please review the 2019 Quality Schools Application Guidelines and Administration Manual for a detailed description of those project costs eligible for reimbursement with Quality Schools grant funds. "Other Costs" are those costs not eligible for reimbursement with Quality Schools grant funds. Applicants that propose to contract for project or grant management assistance with a consultant or other outside entity must specifically itemize these grant administration amounts in the "Other Costs" section of the budget and explain them. Applicants should be careful to verify that all potential costs for carrying out the project are identified prior to submitting the application.

   Note: Construction contingencies for school facility projects typically should be ten percent of the estimated construction cost. If the amount budgeted for contingency is greater or less than ten percent, applicants must justify the reason.

4. PROJECT BUDGET NARRATIVE: Provide a narrative justification for each specific proposed project cost set forth in the preliminary budget. If multiple projects are being proposed as part of a comprehensive upgrade, the cost for each portion

or phase must be broken out.

Land Acquisition: Cost of land purchase, easements, right-of-way, leases, etc.

Preliminary Planning/Engineering: Costs associated with, but not limited to, preparation of preliminary engineering reports, preliminary architectural reports, energy audit, or environmental review of the proposed project.

Engineering/Architectural Design: Costs for preparing approved project plans and specifications and obtaining necessary permits for construction of the project as approved.

Construction Engineering Services: Costs for providing professional inspection and construction engineering services to ensure that the project is constructed according to approved plans and specifications.

Construction: Costs for project construction according to approved plans and specifications.

Materials: Cost of construction materials (if known). For example, the actual cost of a boiler, new windows, or floor tile without the cost of labor. If applying under Statutory Priority #5, hardware and software costs should be indicated in this line item.

Contingency: Construction contingencies for public facility projects typically should not exceed or be less than ten percent of the estimated construction cost. Any deviation must be justified.

Other Costs: Other costs that will be incurred as a result of administering the proposed project and the funding sources associated with it. Other costs are not eligible for reimbursement with Quality Schools grant funds. Appropriate and reasonable cost estimates for personnel, grant administration, office rent, office equipment, supplies, telephone, postage, travel, audit fees, legal costs including bond counsel, etc, and financial costs such as loan origination, administrative fees, debt service reserves, and capitalized interest.

SECTION D – PRELIMINARY IMPLEMENTATION SCHEDULE

Each recipient must submit a preliminary implementation schedule that describes the overall schedule for project completion. The preliminary implementation schedule must address all stages of the project, including Start-Up, Final Design, Bid Advertisement, Construction, and Close-Out. The schedule is broken out by quarter and month for the duration of the 2019 Biennium. Indicate when each item will be completed by placing an "X" in the appropriate box. Fill out the schedule as known or estimated at the time of application, and identify any sources relied on in determining the estimated timeline.

SECTION E – ENVIRONMENTAL REVIEW

The applicant must provide documentation of the completed environmental review process and include with the application all documentation of the public review process, including public notice for and minutes of a public hearing at which the environmental review was discussed, the public comments received, and the final decision on the environmental determination made during a public meeting. Provide a completed copy of Environmental Review Checklist and environmental review forms (the Checklist is included with this application and provided as Exhibit A of the Application Guidelines and Administration Manual). The environmental review process is discussed in detail in Chapter 1 of the Application Guidelines and Administration Manual.

1. ENVIRONMENTAL PERMITS: Describe how the applicant has or will meet all environmental permitting requirements necessary to complete the proposed project, including but not limited to any permits required by the Montana Stream Protection Act, Solid Waste Management Act, the Clean Air Act, Water Quality Act, Public Water Supplies, Distribution and Treatment, Floodplain and Floodway Management, and the Montana State Antiquities Act.

2. <u>COMPLIANCE WITH MONTANA ENVIRONMENTAL POLICY ACT (MEPA):</u> Provide a detailed description of the process followed by the applicant district to meet the requirements of <u>MEPA</u> and the findings resulting from that process. Provide a copy of any environmental review documents completed for the proposed project prior to the submission of this application, including the environmental findings made by the applicant district.

<u>Note</u>: As described in detail in Chapter 1 of the Quality Schools Application Guidelines and Administration Manual, **all necessary environmental review of the proposed project must be completed prior to submission of the application for Quality Schools grant funding**. The Department will not evaluate any application for a proposed project for which environmental review has not already been completed.

SECTION F – BOARD RESOLUTION

1. **Board Resolution:** Provide a copy of the School Board resolution authorizing the District to submit an application for funding to the Quality Schools program and approving the completed Environmental Review and its Findings, if applicable. A sample Board Resolution is available as Exhibit 1 of the Quality Schools Application Guidelines and Administration Manual.

SECTION G – CERTIFICATION

The Superintendent or authorized representative thereof must sign the application certifying that to the best of the official's knowledge and belief, the information provided in the application and the attached documents is true and correct.

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APPLICATION FOR
QUALITY SCHOOLS PROJECT GRANTS

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SECTION A – PROJECT INFORMATION

Please review the Instructions and the Application Guidelines and Administration Manual for Quality Schools Project Grants for assistance in completing this application form.

1. **NAME OF SCHOOL DISTRICT:** _____ **LE #:** _____

2. **COUNTY:** _____

3. **STATUTORY PRIORITY (check one):**   #1   #2   #3   #4   #5   #6

4. **TYPE OF PROJECT:** _____

5. **TOTAL PROJECT COST:** _____

6. **QUALITY SCHOOLS GRANT FUNDS REQUESTED:** _____

7. **DISTRICT SUPERINTENDENT:**
   (or Authorized Representative)
   This individual is authorized to sign official documents

   _____
   (Name)

   _____
   (Title)

   _____
   (Street/PO Box)   (City/State/Zip)

   _____
   (Telephone)   (FAX No)

   _____
   (E Mail address)

8. **PRIMARY CONTACT PERSON:**
   (if different than #7)
   This individual is authorized to sign official documents

   _____
   (Name)

   _____
   (Title)

   _____
   (Street/PO Box)   (City/State/Zip)

   _____
   (Telephone)   (FAX No)

   _____
   (E Mail address)

9. **ENGINEER/ARCHITECT (if applicable):**
   This individual is authorized to sign official documents

   _____
   (Name)

   _____
   (Name of Firm)

   _____
   (Street/PO Box)   (City/State/Zip)

   _____
   (Telephone)   (FAX No)

   _____
   (E Mail address)

10. **DISTRICT CLERK (if applicable):**
    This individual is authorized to sign official documents

    _____
    (Name)

    _____
    (Title)

    _____
    (Street/PO Box)   (City/State/Zip)

    _____
    (Telephone)   (FAX No)

    _____
    (E Mail address)

11. GRANT ADMINISTRATOR (if applicable):

This individual is authorized to sign official documents

_____
(Name)

_____
(Name of Firm)

_____
(Street/PO Box)   (City/State/Zip)

_____
(Telephone)   (FAX No)

_____
(E Mail address)

PLEASE PROVIDE A RESPONSE AFTER EACH SECTION OR EACH STATEMENT BELOW.

12. PROJECT DESCRIPTION:

(a) <u>**Summary of Project:**</u> Please provide a concise description of the project, the work to be completed, and the projected outcome.

Applicant's Response:

<u>**Relevant Background Information:**</u> Include the age of the facility and any other relevant background information on the facility or proposed project.

Applicant's Response:

List of Facilities or Facility Components Involved in Project:

> **Applicant's Response:**
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(b) Statement of Need: What need or problem will be addressed by the receipt of a Quality Schools project grant? Reference any reports/studies that have been conducted to support the claim for need. Attach all associated documents to the application packet.

> **Applicant's Response:**
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(c) Statutory Priorities: Please describe how the project meets **at least one** statutory priority. If the project meets more than one statutory priority, please provide a response to every Statutory Priority that fits the project description. Please focus your response to those Statutory Priorities that are a close fit. The application will be ranked based on the most relevant Statutory Priority that provides the applicant the highest ranking score. Please review and use the detailed description of each priority, and examples of types of projects that would qualify under each priority, found in the 2019 Biennium Application Guidelines and Administration Manual.

Priority #1: This priority includes **projects that solve urgent and serious public health or safety problems or that enable public school districts to meet state or federal health or safety standards**, such as the Americans with Disabilities Act or fire codes. Examples of these types of projects may include remedying items of serious life safety or building integrity; or improvements to facilities or facility components that address high priority public health and safety problems, such as inadequate fire protection, water supply, heating systems, food storage, etc. **Include documentation.**

    a. Does a serious health or safety deficiency exist in a critical facility component that is necessary to providing a basic school service? If so, please describe. Does the school lack the service entirely, and will the deficiencies be corrected by the proposed project?

    b. Does the applicant provide adequate documentation that a serious public health and safety issue is present, or that it violates a federal public health and safety standard? (e.g., report from the Fire Marshal, DPHHS, a water test, asbestos test, etc.)

    c. Is the applicant addressing a need to meet local, state or federal code(s) or standard(s)? If so, please describe the need for upgrades in detail, and include the applicable code that the proposed project will remedy.

    d. Is the proposed project necessary to comply with a court order or a state or federal agency directive? Has the applicant included documentation of this?

    e. Have serious public health or safety problems that are clearly attributable to a deficiency occurred, or are they likely to occur? (Ex: illness, disease outbreak, substantial property loss, environmental pollution, or safety problems or hazards)

f. Is the problem existing, continual, and long-term, as opposed to occasional, sporadic, probable or potential? What portion of students are affected by the problem?

g. Are there any reliable and long-term management practices that would reduce the school health or safety problems? *(If yes, describe the practice(s) and the school's use of such practice(s). If the school has not adopted such practice(s), explain why not.)*

Applicant's Response:

Priority #2: This priority includes **projects that address deferred maintenance by repairing or replacing existing building components that are inoperable or difficult to service or lack minimum integrity**. This Priority includes projects that address deferred maintenance to and extend the life of existing school buildings. Examples of these types of projects include infrastructure repairs or updates such as boiler replacement or roof repairs. The proposed projects' building component should be identified as the highest priority need for repair or replacement in the district's facility master plan or maintenance plan, or be expected to fail or reach the end of its useful life in the near future as determined by a qualified third party. **Include documentation.**

a. Please describe the needed repair or replacement and the degree to which the existing component is inoperable or difficult to service or lacks minimum integrity.

b. When is the building component expected to fail or reach the end of its useful life?

c. Is the applicant addressing a need to meet local, state or federal code(s) or standard(s)? If so, please describe the need for upgrades in detail, and include the applicable code that the proposed project will remedy.

d. Will the proposed project protect and extend the life of the facility? *(Deteriorated components that may have a ripple effect on other building components if not addressed constitute a higher priority, in order to not "lose ground" with a district's overall capital investment.)*

e. Are there operation and management practices that would reduce the school's need for deferred maintenance project? Explain.

Applicant's Response:

Priority #3: This priority includes **projects that enhance a public school districts ability to offer specific services related to the requirements of the accreditation standards provided for in Section 20-7-111, MCA.** The accreditation standards set forth in Administrative Rules of Montana 10.55 *et seq.*, include standards for school leadership,

educational opportunities, academic requirements, and program area standards for communication, arts, health enhancement, mathematics, science, social studies, career and vocational/technical education, library/media, school counseling, and world languages. Quality Schools grants are available to fund projects that enhance a district's ability to offer specific services related to these accreditation standards. Facility accreditation standards for The State of Montana are set by the Board of Public Education, upon the recommendation of the state Superintendent of Public Instruction. Current accreditation standards for K-12 schools in Montana are provided in section 20-7-101, MCA. **Include documentation.**

   a.   What specific service or area of accreditation will be met or enhanced by this project? Please describe, in detail, the service the district offers or will offer, how the district's ability to offer that service will be enhanced by the proposed project, and how that service relates to the requirements or an accreditation standard in ARM 10.55. Cite the specific accreditation standard or standards.
   b.   Has the district received an accreditation status letter from the Office of Public Instruction showing a deviation in the area of accreditation that will be remedied by the project?
   c.   Is the applicant addressing a facility accreditation standard requiring the district to meet local, state or federal code(s) or standard(s)? If so, please describe the need for upgrades in detail, and include the applicable code that the proposed project will remedy.
   d.   Is the project necessary in order for the district to meet a new or expanded accreditation standard, or to continue to meet an existing accreditation standard? Explain.
   e.   Is the school facility of sufficient size and arrangement to meet all programs' educational goals in relation to accreditation standards set forth in ARM 10.55 *et seq.*? Explain.
   f.   Has the applicant taken into consideration any recommendations from national educational facility planning organizations, such as CEFPI (Council of Educational Facility Planners) when planning the project?

> **Applicant's Response:**

Priority #4: This priority includes **projects that provide long-term, cost-effective benefits through energy efficient design.** Quality Schools project grants can be used to implement energy efficiency improvements to a school facility or a portion thereof or energy conservation measures (ECMs). Energy efficiency projects must be based on prior evaluation of the facility to determine the degree of deficiency, cost savings and relative payback. An acceptable form of evaluation includes an energy audit performed no more than five (5) years prior to the date of the grant application, or, Quality Schools will accept the K-12 School Facility Condition Assessment (FCI Report, 2008) as the basis for an energy-efficiency improvement if the proposed improvements are specifically identified in the report and show more than 50% deficiency. **Include documentation.**
   a.   Please describe the proposed energy improvement deficiency. Is the proposed energy-efficiency improvement project based on an energy audit completed within the last 5 years? Or, is the issue addressed in the K-12 School Facility Condition Assessment or in a recent FCI Report? Does the applicant provide the audit or FCI report?
   b.   Is the proposed project identified in the audit as a priority energy conservation measure (ECM)? Or is the measure more than 50% deficient in the FCI report? What is the current level of efficiency for the building component or components being addressed?
   c.   Is the proposed project expected to achieve measurable energy efficiency savings to the facility? Over what period of time? What is the estimated useful life of the materials or equipment installed for each proposed improvement?
   d.   What are the total cost savings to the school district resulting from proposed project? What is the estimated payback period for the district to realize those savings?

e. Is the project making use of green materials or alternative energy sources?

> **Applicant's Response:**

Priority #5: This priority includes **projects that incorporate long-term, cost effective benefits to school facilities, including the technology needs of school facilities.** The integration of technology in education represents a fundamental change in the traditional methods of teaching and learning. Education delivery strategies utilizing technology provide new opportunities for school districts to offer academic courses and professional development opportunities to every school across the state. Statutory priority #5 supports projects that integrate technology into Montana's educational framework to support a variety of student educational needs for the 21st Century. The Montana Office of Public Instruction (OPI) and the State Board of Public Education have put in place rules and guidelines aimed to establish learning standards and increase technological aptitude of students at all levels. These types of projects may include information technology infrastructure, including installations, upgrades, or improvements to existing school facilities. **Include documentation.**

a. Describe how the proposed project will incorporate long-term, cost-effective benefits to the school district?
b. What technology resources does the school facility currently have, and how will the facility, its current resources benefit from the proposed project?
c. Will the project enhance or support student's needs for the 21st century, according to those set forth by OPI?

> **Applicant's Response:**

Priority #6: This priority includes **projects that enhance educational opportunities for students.** Schools provide a wide range of educational opportunities that can be enhanced through other forms or types of instructional, experiential, or performance programs. This priority includes projects that enhance educational opportunities or alternative methods to instruction for students through school facility improvements. **Include documentation.**

a. Please describe the proposed project and its needed improvements.
b. Please describe how the proposed project will enhance the educational opportunities of the district.
c. Please discuss how the proposed project will extend the life of the current facility or how the project will add to the infrastructure of the district?
d. Please describe how the project is fiscally responsible, considering both long-term and short-term needs of the public school district, the local community, and the state.

Applicant's Response:

(d) **Statutory Attributes:** Please explain how and to what extent the proposed project meets each statutory attribute and provide all information listed. If additional documents are needed to further validate how and the extent to which the proposed project meets a particular attribute, please explain and reference those documents in the appropriate box below, and attach copies to the application form. **Include documentation.**

(1) The project's need for financial assistance.

    a. Please describe the district's need for financial assistance with the proposed project. *(Address issues such as taxable base, bonding capacity, etc.).*

    b. Please include a detailed description of holdings in the following accounts: Building Reserve, Deferred Maintenance, Impact Aid, Flex Fund, Building Fund, and Technology Fund, and how these funds have been allocated or accrued for future investments within the past 5 years. Include documentation, such as relevant section of school budget, school board minutes, etc to support the statements made. *(The Department may consult with the Office of Public Instruction on this attribute).*

    c. Please provide the District Median Household income, District Mill Value, and Percentage of students eligible for free and/or reduced cost lunch.

Applicant's Response:

(2) The fiscal capacity of the public school district to meet grant conditions required by the Department.

    a. Please describe the district's previous experience with grant management. *(Identify individual district personnel and their experience with grant management and administration).*

    b. Has the district previously secured and administered other sources of funding? *(Please give examples of prior grants and funding).*

    c. Please describe and give examples of past projects that have been successfully managed by the district within a given timeframe.

Applicant's Response:

(3) Past efforts to ensure sound, effective, long-term planning and management of the school facility and attempts to address school facility needs with local resources.

    a. Is a long-range master plan or comprehensive facility plan in place for the district? Is the proposed project identified as a priority in the master plan? How was this project selected as the top priority over other projects? *(Please include the sections of the master plan or comprehensive master plan that are relevant).*

    b. Have all reasonable alternatives to the project been considered? *(Please explain how the project is the most efficient, cost-effective and appropriate option for the district).*

    c. Please describe all necessary planning tools and resources that were used to ensure a sound and successful project? *(Please include documentation such as a PER, PAR, tests, reports, environmental assessment, etc.).*

    d. Please describe the fiscal measures the district has taken over the past 10-15 years to address school facility issues with local resources. Include a discussion of capital improvement planning, budgeting, and bonding history.

Applicant's Response:

(4) The ability to obtain funds from sources other than the funds provided by the Quality Schools grant program.

    a. Describe the district's effort to build a viable funding package for the project. Discuss your efforts to seek out, secure, and firmly commit additional funds from all appropriate public or private sources to finance the project. *(Please discuss all programs, loans, and grants that are currently a part of the funding package. If applications are awaiting review, please mention their status. Refer to Section D for additional information).*

    b. Is the project financially viable without funding from the Quality Schools Grant Program? Has the district pursued all avenues for alternative funding and conducted all financial planning necessary to create a viable funding package? If Quality Schools funding is not awarded what alternatives will the district pursue?

    c. Does the district receive Oil and Gas Production Tax, Coal Gross Proceeds Tax, Metal Mines License Tax, other such sources of revenue? What is the amount received in FY2013-2014? Is the source reserved for a specific purpose?

    d. What is the District's bonding capacity and current percentage of bond capacity remaining?

e. Please describe all of your District's bond election failures and successes in the last 10-15 years and the purpose for each bond election.

Applicant's Response:

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(5) The importance of the project and support for the project from the community.

a. Describe the community's involvement and awareness of the project. If a Master Plan or Comprehensive Facility Plan exists, was the community involved in its formation? *(Discuss and include documentation of any form of public participation, such as public meetings, community events, websites, etc.)*
b. Describe the community's support for the project. *(Discuss financial support, volunteering, etc. Include documentation such as letters of support, surveys, petitions, letters to the editor, etc.)*

Applicant's Response:

(e) <u>Educationally Relevant Factors</u>: Check all that apply and use the space provided to explain how and to what extent the proposed project meets the selected educationally relevant factor(s) listed in <u>Section 20-9-309, MCA</u>. If additional documents are needed to further validate how and the extent to which the proposed project meets a particular factor, please explain and reference those documents in the appropriate box below, and attach copies to the application form.

a. The number of students in a district.
b. The needs of isolated schools with low population density.
c. The needs of urban schools with high population density.
d. The needs of students with special needs, such as a child with a disability, an at-risk student, a student with limited English proficiency, a child who is qualified for services under <u>29 U.S.C. 794</u>, and gifted and talented children.
e. The needs of American Indian students.
f. The ability of school districts to attract and retain qualified educators and other personnel.

Applicant's Response:

SECTION B – GRANT MANAGEMENT

If the district plans to contract with an outside firm or consultant for grant management services, please provide the name of the company/individual. *Note: Grant administration costs are not eligible for reimbursement under the Quality Schools Grant Program. The district will be responsible for these costs using other funding sources.*

Applicant's Response:

SECTION C – FINANCIAL INFORMATION

1. **Proposed Funding Sources:** (List loans and grants from same funding source separately.)

	Source	Type of Funds	Amount	Status of Commitment	Conditions on Use	Date Available (MM/YYYY)
1	Quality Schools	Grant	$	Application Submitted	Ability to meet requirements set forth in the Quality Schools Application Guidelines and contract	
2			$			
3			$			
4			$			
5			$			

2. **Funding Strategy Narrative:**

   a. Is there any additional information on the conditions of the use of each source of funds?
   b. Is there any additional information on the level of commitment or date available for each source of funds listed?
   c. How will funding sources be coordinated with each other?
   d. If a particular source of funding is not obtained, how will the applicant proceed? Explain how the funding strategy will change if a particular source of funding is not received.

   ┌───┐
   │ **Applicant's Response:**   │
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   │   │
   │   │
   │   │
   └───┘

3. **Preliminary Project Budget:** Complete the attached Project Budget form.

4. **Project Budget Narrative:** Complete the attached Project Budget Narrative form.

SECTION D – PRELIMINARY IMPLEMENTATION SCHEDULE

Complete the Project Implementation Schedule form.

SECTION E – ENVIRONMENTAL REVIEW

The applicant must provide documentation of the completed environmental review process and include with the application all documentation of the public review process, including public notice for and minutes of a public hearing at which the environmental review was discussed, the public comments received, and the final decision on the environmental determination made during a public meeting. Provide a completed copy of Environmental Review Checklist and environmental review forms (the Checklist is included with this application and provided as Exhibit A of the Application Guidelines and Administration Manual). The environmental review process is discussed in detail in Chapter 1 of the Application Guidelines and Administration Manual.

Note: As described in detail in Chapter 1 of the Quality Schools Application Guidelines and Administration Manual, **all necessary environmental review of the proposed project must be completed prior to submission of the application for Quality Schools grant funding**. The Department will not evaluate any application for a proposed project for which environmental review has not already been completed.

1. **Environmental Permits:** Describe all state or federal environmental permits required to complete the proposed project. For each permit, identify whether the applicant has already obtained the permit, and if not, describe the applicant plans to obtain such permit.

2. **MEPA Compliance**: Describe the process followed by the application district to meet all MEPA requirements, and the findings resulting from that process. Please attach a copy of all environmental review documents related to the proposed project.

SECTION F - BOARD RESOLUTION

1.   **Board Resolution:** Provide a copy of the School Board resolution authorizing the District to submit an application for funding to the Quality Schools program and approving the completed Environmental Review and its Findings, if applicable. A sample Board Resolution is available as Exhibit I of the Quality Schools Application Guidelines and Administration Manual.

SECTION G - CERTIFICATION

To the best of my knowledge and belief, the information provided in this application and in the attached documents is true and correct.

Name (printed):   _____

Title (printed):   _____
                     District Superintendent or Authorized Representative

Signature: _____

Date: _____

PRELIMINARY PROJECT BUDGET

Completed by: _____   For: _____   Date: _____

QUALITY SCHOOLS ELIGIBLE COSTS:	SOURCE: Quality Schools Grant Program	SOURCE:	SOURCE:	SOURCE:	SOURCE:	TOTAL
Land Acquisition						$0.00
Engineering/Architectural Design						$0.00
Construction Engineering Services						$0.00
Construction						$0.00
Materials						$0.00
Contingency						$0.00
TOTAL ELIGIBLE COSTS	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
OTHER (INELIGIBLE) COSTS:						
Personnel Costs	NA					$0.00
Office Costs	NA					$0.00
Project Administration	NA					$0.00
Legal Costs (including Bond Counsel)	NA					$0.00
Audit Fees	NA					$0.00
Travel & Training	NA					$0.00
Loan Fees & Reserves	NA					$0.00
Other Ineligible Costs	NA					$0.00
TOTAL OTHER COSTS	NA	$0.00	$0.00	$0.00	$0.00	$0.00
TOTAL PROJECT COSTS	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

PROJECT BUDGET NARRATIVE – please provide an explanation of all costs.	
QUALITY SCHOOLS ELIGIBLE COSTS	
Land Acquisition	$
Engineering/Architectural Design	$
Construction Engineering Services	$
Construction	$
Materials	$
Contingency	$
Total ELIGIBLE Costs	$
OTHER (INELIGIBLE) COSTS	
Preliminary Engineering/Architectural Design	$
Personnel Services	$

OTHER COSTS cont'd	
Office Costs	$
Project Administration	$
Legal Costs (including Bond Counsel)	$
Audit Fees	$
Travel & Training	$
Loan Fees & Reserves	$
Other Ineligible Costs	$
Total OTHER Costs	$

PRELIMINARY IMPLEMENTATION SCHEDULE

| | QUARTERS, 2017 | | | | | | | | | QUARTERS, 2018 | | | | | | | | | | | | QUARTERS, 2019 | | | |
| | 2nd | | | 3rd | | | 4th | | | 1st | | | 2nd | | | 3rd | | | 4th | | | 1st | | | 2nd | | |
TASK	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
START-UP																											
Receive Notice of Award (estimated)		- x -																									
Secure Approval of Other Funding																											
Finalize Project Budget																											
Execute Quality Schools Contract																											
PROJECT DESIGN																											
Advertise for and Select Engineer																											
Begin Project Design																											
Complete Project Design																											
Prepare Bid Documents																											
BID ADVERTISEMENT																											
Public Bid Advertisement																											
Open Bids and Examine Proposals																											
Select Contractor, Award Bid																											
PROJECT CONSTRUCTION																											
Begin Construction																											
Conduct Labor Compliance Reviews																											
Submit Project Progress Reports																											
Final Inspection																											
CLOSE-OUT																											
Submit Final Drawdown Request																											
Submit Project Close-Out Report																											

ENVIRONMENTAL REVIEW CHECKLIST

NAME OF PROJECT:	
PROPOSED ACTION:	
LOCATION:	_____ , Montana

Key Letter:
N: No Impact; **N/A:** Not Applicable; **B:** Potentially Beneficial; **A:** Potentially Adverse; **P:** Approval/Permits Required; **M:** Mitigation Required

PHYSICAL ENVIRONMENT		
Key	1	Soil Suitability, Topographic and/or Geologic Constraints (e.g., soil slump, steep slopes, subsidence, seismic activity)
		Response and source of information:
Key	2	Hazardous Facilities (e.g., power lines, hazardous waste sites, acceptable distance from explosive and flammable hazards including chemical/petrochemical storage tanks, underground fuel storage tanks, and related facilities such as natural gas storage facilities & propane storage tanks)
		Response and source of information:
Key	3	Effects of Project on Surrounding Air Quality or Any Kind of Effects of Existing Air Quality on Project (e.g., dust, odors, emissions)
		Response and source of information:

Key	4	Groundwater Resources & Aquifers (e.g., quantity, quality, distribution, depth to groundwater, sole source aquifers)
		Response and source of information:
Key	5	Surface Water/Water Quality, Quantity & Distribution (e.g., streams, lakes, storm runoff, irrigation systems, canals)
		Response and source of information:
Key	6	Floodplains & Floodplain Management (Identify any floodplains within one mile of the boundary of the project.)
		Response and source of information:
Key	7	Wetlands Protection (Identify any wetlands within one mile of the boundary of the project.)
		Response and source of information:
Key	8	Agricultural Lands, Production, & Farmland Protection (e.g., grazing, forestry, cropland, prime or unique agricultural lands) (Identify any prime or important farm ground or forest lands within one mile of the boundary of the project.)
		Response and source of information:

Key	9	Vegetation & Wildlife Species & Habitats, including Fish and sage grouse (e.g., terrestrial, avian and aquatic life and habitats)
		Response and source of information:
Key	10	Unique, Endangered, Fragile, or Limited Environmental Resources, Including Endangered Species (e.g., plants, fish or wildlife)
		Response and source of information:
Key	11	Unique Natural Features (e.g., geologic features)
		Response and source of information:
Key	12	Access to, and Quality of, Recreational & Wilderness Activities, Public Lands and Waterways, and Public Open Space
		Response and source of information:
HUMAN ENVIRONMENT		
Key	1	Visual Quality – Coherence, Diversity, Compatibility of Use and Scale, Aesthetics
		Response and source of information:

Key	2	Nuisances (e.g., glare, fumes)
		Response and source of information:

Key	3	Noise -- suitable separation between noise sensitive activities (such as residential areas) and major noise sources (aircraft, highways & railroads)
		Response and source of information:

Key	4	Historic Properties, Cultural, and Archaeological Resources
		Response and source of information:

Key	5	Changes in Demographic (population) Characteristics (e.g., quantity, distribution, density)
		Response and source of information:

Key	6	General Housing Conditions - Quality, Quantity, Affordability
		Response and source of information:

Key	7	Displacement or Relocation of Businesses or Residents
		Response and source of information:

Key	8	Public Health and Safety
		Response and source of information:

Key	9	Lead Based Paint and/or Asbestos
		Response and source of information:

Key	10	Local Employment & Income Patterns - Quantity and Distribution of Employment, Economic Impact
		Response and source of information:

Key	11	Local & State Tax Base & Revenues
		Response and source of information:

Key	12	Educational Facilities - Schools, Colleges, Universities
		Response and source of information:

Key	13	Commercial and Industrial Facilities - Production & Activity, Growth or Decline.
		Response and source of information:

Key	14	Health Care – Medical Services
		Response and source of information:

Key	15	Social Services – Governmental Services (e.g., demand on)
		Response and source of information:

Key	16	Social Structures & Mores (Standards of Social Conduct/Social Conventions)
		Response and source of information:

Key	17	Land Use Compatibility (e.g., growth, land use change, development activity, adjacent land uses and potential conflicts)
		Response and source of information:

Key	18	Energy Resources - Consumption and Conservation
		Response and source of information:

Key	19	Solid Waste Management
		Response and source of information:

Key	20	Wastewater Treatment - Sewage System
		Response and source of information:

Key	21	Storm Water – Surface Drainage
		Response and source of information:

Key	22	Community Water Supply
		Response and source of information:

Key	23	Public Safety – Police
		Response and source of information:

Key	24	Fire Protection – Hazards
		Response and source of information:

Key	25	Emergency Medical Services
		Response and source of information:

Key	26	Parks, Playgrounds, & Open Space
		Response and source of information:

Key	27	Cultural Facilities, Cultural Uniqueness & Diversity
		Response and source of information:

Key	28	Transportation Networks and Traffic Flow Conflicts (e.g., rail; auto including local traffic; airport runway clear zones - avoidance of incompatible land use in airport runway clear zones)
		Response and source of information:
Key	29	Consistency with Local Ordinances, Resolutions, or Plans (e.g., conformance with local comprehensive plans, zoning, or capital improvement plans)
		Response and source of information:
Key	30	Is There a Regulatory Action on Private Property Rights as a Result of this Project? (consider options that reduce, minimize, or eliminate the regulation of private property rights.)
		Response and source of information:

Environmental Review Form

On a separate piece of paper, please answer the following as they apply to your proposed project:

1. **Alternatives:** Describe reasonable alternatives to the project.

2. **Mitigation:** Identify any enforceable measures necessary to reduce any impacts to an insignificant level.

3. **Is an EA or Environmental Impact Statement (EIS) required?** Describe whether or not an EA or EIS is required, and explain in detail why or why not.

4. **Public Involvement:** Describe the process followed to involve the public in the proposed project and its potential environmental impacts. Identify the public meetings — where and when — the project was considered and discussed, and when the applicant approved the final environmental assessment.

5. **Person(s) Responsible for Preparing:** Identify the person(s) responsible for preparation of this checklist.

6. **Other Agencies**: List any state, local, or federal agencies that have over-lapping or additional jurisdiction or environmental review responsibility for the proposed action and the permits, licenses, and other authorizations required; and list any agencies or groups that were contacted or contributed information to this Environmental Assessment (EA).

_____   _____
  Authorized Representative   Date