

SOUTH CAROLINA COMMISSION ON HIGHER EDUCATION CAPITAL FUNDING GOALS FOR PUBLIC HIGHER EDUCATION INSTITUTIONS

The following goals have been formulated to guide the Commission on Higher Education in making capital funding recommendations to the Governor and the General Assembly.

STATEWIDE GOALS

- To ensure campus health and safety by supporting projects designed to remedy existing issues that adversely affect human well being
- To address critical maintenance needs of the institutions, thereby protecting the State's capital investment in higher education
- To alleviate problems resulting from critical enrollment and/or programmatic growth, including needs for state-of-the-art academic space
- To support needs that are significant to continuing economic development in the state or service area

Points will be assigned to Related Standards, Rating Criteria, and Other Considerations. A maximum of 80 points may be generated through Related Standards and a maximum of 120 points may be generated through Rating Criteria. An additional 5 points may be generated based on Other Considerations. Projects will be rated according to the total combined number of points generated up to a maximum of 205 points.

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(REVISED FEBRUARY 2009)

SECTION I – RELATED STANDARDS

Each proposed project will be reviewed and rated for consistency and compatibility with the following related standards:

- ❖ **STANDARD 1. The proposed project is consistent with the institutions master plan and is critical and central to the institution's approved mission. (If project does not meet these criteria, request will not be scored, prioritized, or recommended for state bond funding.)**

➤ **EVALUATION**

- a. Evaluated against approved mission statement augmented by institution data which can include the project's consistency with the institution's Master Plan and Strategic Plan.

- ❖ **STANDARD 2. The degree to which the proposed project's ultimate outputs (e.g., degrees awarded by discipline, number of graduates, type and volume of research, etc.) are adding critical capacity and functionality to address defined state needs. (up to 24 points)**

➤ **EVALUATION**

- a. Academic space per FTE and/or Sq Ft of research space per research \$ expended, augmented by institutional data if available.
 - i. Equal to or under standard = 24
 - ii. Over standard plus confirming documentation = 20
 - iii. Over standard but no documentation or documentation N/A = 0

- ❖ **STANDARD 3. The degree to which the need for the quantity and type of space can be defended through the application of objective space analysis, including space guidelines and appropriateness of offerings. (up to 20 points)**

- 1. **EVALUATION**

- a. Measured against fall 2008 space factor for classroom utilization, augmented by institutional data if available (studies showing that additional space or different space is needed)
 - i. Under standard = 20
 - ii. External documentation of accreditation deficiencies = 20
 - iii. Over standard plus confirming documentation = 16
 - iv. Over standard but no documentation or documentation N/A = 0

- ❖ **STANDARD 4. The degree of non-capital improvement bond funding beyond the required local support included in the project. (up to 20 points)**

- 1. **EVALUATION**

- a. Information from CPIP, augmented by data provided by institution if available
 - i. Documented external funding of 20% or more of total project = 20
 - ii. Documented external funding < 20% of total project = 15
 - iii. Documented external funding < or = 15% of total project = 10
 - iv. Documented external funding < or = 10% of total project = 5
 - v. Documented external funding < 5% of total project = 0

- ❖ **STANDARD 5. Documented Operational Savings or Documented Reduction in Maintenance Needs. (up to 10 points)**

- 1. **EVALUATION**

- a. Verification that project has operational savings, or reduction in maintenance needs
 - i. Both verifications = 10
 - ii. One of the above = 7

- ❖ **STANDARD 6. Documentation that all alternatives have been explored and that the proposed remedy is the best option available. (up to 6 points)**

- 1. **EVALUATION**

- a. Documentation included in CPIP – 6

Maximum Points for Related Standards = 80

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SECTION II – RATING CRITERIA

1) HEALTH & SAFETY (up to 30 points)

a. The degree to which an existing condition can be documented to be unsafe and/or unhealthy for human well being. (up to 15 points)

➤ **EVALUATION**

- ❖ Verified by professional study or institutional evaluation:
 - i. Air quality, code issues, or life safety issues (professional study) = 15
 - ii. Air quality, code issues, or life safety issues (institutional justification) = 7

b. The appropriateness of the proposed solution to the defined health or safety issue.

➤ **EVALUATION**

- ❖ Institutional documentation = 7.5

c. The degree that the institution's and the State's well being would be adversely impacted through discontinuance of activities if the defined health and safety issue(s) are not addressed.

➤ **EVALUATION**

- ❖ Information from CPIP, studies on file at CHE, and institutional documentation if provided
 - i. Institutional verification that activities could not be conducted in alternate facilities so as to require discontinuance = 7.5

2) MAINTENANCE NEEDS (MN) (up to 30 points)

a. The degree to which the proposed project addresses maintenance needs as reported in the institution's CHEMIS submission using a rolling average over the most recent three-year period.

➤ **EVALUATION**

- ❖ Information will be obtained from Building Data Summary, generated by CHEMIS. Points assigned based on range of building condition codes (below):

<u>Building or Infrastructure Condition Code</u>	<u>Points Assigned</u>
New Construction or N/A	0
90-100	0
80-89	7.5
70-79	12.5
0-69	15

b. The degree to which the institution's expenditures for building maintenance compare with the amount generated for building maintenance¹ in the MRR (according to the percent funded to the institution) using a rolling average for the most recent three-year period.

➤ **EVALUATION**

- ❖ Institutions report amount expended for routine maintenance (from any source) for E&G Buildings. Data will be compared with the amounts generated by MRR (at the percent funded to the institution) and averaged for the most recent three-year period.
 - i. Expenditure for E&G maintenance equal to or greater than MRR estimates = 15
 - ii. Expenditure not reported but data for estimate available to CHE = 15
 - iii. Expenditure less than MRR estimate or not reported and estimate not available = 0

3) ENROLLMENT & PROGRAMMATIC GROWTH (up to 30 points)

- a. **The degree to which a space shortage can be objectively supported through space analysis – both on an institutional macro level as well as the micro level of a particular program.**

➤ **EVALUATION**

- ❖ Data to be supplied by institution
 - i. External confirming documentation/data = 15
 - ii. Internal confirming documentation/data = 12.5
 - iii. None Reported or N/A = 0

- b. **The degree to which the need for the outputs of the additional proposed space cannot be met through alternative delivery systems (e.g., distance learning technologies, etc.).**

➤ **EVALUATION**

- ❖ Data to be supplied by institution, if applicable.
 - i. If none can be met based on program of study = 15
 - ii. If all dedicated to distance learning = 15
 - iii. If can be partially met = 11
 - iv. No documentation or N/A = 0

4) ECONOMIC DEVELOPMENT (up to 30 points)

- a. **The proposed project is consistent with the State's and/or service area's priorities for continuing economic development as supported by appropriate economic development entities (e.g., State, Local, or Regional Departments of Commerce).**

➤ **EVALUATION**

- ❖ Documented evidence – 10

- b. **The proposed project is a critical component of an articulated State, regional, or community comprehensive economic development plan.**

➤ **EVALUATION**

- ❖ Documented evidence – 10

- c. **Funding critical to the overall success of the economic development initiative was provided by external parties (e.g. Local funding).**

➤ **EVALUATION**

- ❖ Documented evidence of funding amounts – 10

Maximum Points for Rating Criteria = 120

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SECTION III – OTHER CONSIDERATIONS

1. Previously Approved Capital Improvement Bonds (CIBs) & State Funding

Projects that have previously received CIBs and/or State funding (documentation to be provided by the institution) will be scored in the following manner:

- If percentage of previous amount funded is greater than 25% of the current project = 4 points
- If percentage of previous amount funded is less than 25% of the current project = 2 points

2. Longevity of Request for CIB Funding

- If institution has previously requested state bond funding (in year two of the CPIP) for this project continuously for five or more years = 1 point (*Institutions must provide appropriate documentation.*)

3. Essential Sequencing of Multiple Projects

Projects that require a phasing sequence with other projects in the ranking list will be listed in the order required. An example of a phasing requirement would be a utility plant expansion request that would need to be completed before a new building request could come online due to insufficient existing utilities capacities. If the rankings established by the process outlined in this document do not place projects in the appropriate phasing sequence, then the project rankings will be revised accordingly. This would be accomplished by ranking all other projects involved in the phasing sequence behind the initial project. If the second project has a higher percentage point total, then it will be moved to immediately after the first project. The rationale would continue for the third and subsequent projects as necessary. (*This may be used for projects that have received partial funding and for which the institution can document a continuing critical need and/or to differentiate between projects that have the same scores.*)

Maximum Points for Other Considerations = 5 points

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¹ **Building Maintenance** is defined as the work necessary to keep a building in good appearance and usable condition and prevent the building from deterioration once it has been placed in first class condition for that type and age of building. Building maintenance includes minor repairs and alterations, costs of materials, hire of personnel, and other necessary expenses for the repair and/or painting of the following: roofs, exterior walls, foundations, flooring, ceilings, partitions, doors, windows, plaster, structural ironworks, screens, windows shades, blinds, plumbing, heating and air conditioning equipment within or a part of the building, electric wiring, light fixtures (including the replacement of lamps), washing of all outside window surfaces, built-in shelving, and other related items.