

## DISTRICT EVALUATION TOOLS

Weighted Score	Weight	Eval	
			1.) First Step - Evaluating Need Has a clear and convincing need for facility expansion or modernization been explained in the District's Facilities Master Plan
0	3	0	Have the specific issues been listed? 10-Listed & Specified 5-Listed Not Specified 1-Listed
0	2	0	Have the items been given estimated costs? 10-Fully Costed 4-Site Costed / No detail 1-No Costing
0	1	0	Do the costs seem reasonable compared to area benchmarks? 10-Costs are reasonable, compared to element benchmarks 7-Costs for entire project are reasonable 1-No comparison provided
0	1	0	Are distinctions made between necessary and discretionary? 10-Broken down between required & discretionary within projects 5-Broken down between required & discretionary for project 1-No breakdown
0	2	0	For Modernization, what are the long term demographics of the modernizing school catchment areas, and are there opportunities to deliver operational savings via the inevitable consolidation that occurs in areas of declining enrollment? 10-Plan includes Demographic projections and allocates spending to best meet long term goals 5-Some degree of allocation by demographics 1-Everybody gets something <b>or</b> declining demographics (-3)-Everybody gets something <b>and</b> declining demographics
0	2	0	Has the District maximized opportunities to fund self supporting projects and maintenance through non-bond finance methods. 10-All possible self sustaining projects taken out of bond 5-Some projects out of bond 1-No projects out of bond (-3)-Some projects in bond that could be financed with other mechanisms but District refuses after notification.
0	2	0	For new schools in developing areas, how much is available in developer fees? 10-Bonds augment development fees, with builders able to "build their own" 5-Builder share low <b>or</b> builder "not able to build their own" 1-Builder share low <b>and</b> builder "not able to build their own" (-3)-Builder development fees not included in analysis for new construction (-5)-Majority of costs pushed to taxpayers

			2.) Second Step - Looking at the current financial stewardship of the District.	
			<b>First Cost Reduction</b>	
0	3	0	<b>Mandatory Competitive bidding</b> 10-Mandatory competitive billing for all services in bond language 5-Mandatory competitive billing for all services in policies. 3-Some use of restricted lists 1-No commitment to competitive bidding <b>or</b> past no bid to campaign contributors (-3) No commitment to competitive bidding <b>and</b> past no-bid to campaign contributors (-5) No commitment to competitive bidding <b>and</b> past no-bid to campaign contributors <b>and</b> current campaign contributors (-10) No commitment to competitive bidding <b>and</b> past no-bid to campaign contributors <b>and</b> current campaign contributors <b>and</b> current no-bid contracts	
0	3	0	<b>OFCI (Owner Furnished Contractor Installed)</b> 10-Mandatory OFCI in bond language 5-Mandatory OFCI in policies 1-No Commitment on OFCI	
0	4	0	<b>Competitive DB / Re-Use</b> 10-Mandatory DB / Re-Use in bond language 5-Mandatory DB / Re-Use in policies 1-No commitment to DB / Re-Use	
0	3	0	<b>Bulk purchases</b> 10-Mandatory bulk purchases in bond language 5-Mandatory bulk purchase in policies 1-No commitment to bulk purchases	
0	1	0	<b>Cost reduction Bounties</b> 10-Cost reduction bounties in bond language 5-Cost reduction bounties in policies 1-No commitment to cost reduction bounties	
0	1	0	<b>No escalation in fee with price inflation clause</b> 10-Fee escalation containment in bond language 5-Fee escalation containment in policies 1-No commitment to Fee escalation containment	
0	4	0	<b>Marginal Life Cycle cost analysis</b> 10-Full marginal life cycle cost analysis in bond language and preliminary cost benefit in Facilities Master Plan 8-Full marginal life cycle cost analysis in policies and preliminary cost benefit in Facilities Master Plan 7-Full marginal life cycle cost analysis in bond language 6-Full marginal life cycle cost analysis in policies 5-Preliminary full life cycle cost analysis in Facilities Master Plan 1-No commitment to Full marginal life cycle cost analysis (-3) Minor discretionary projects (<10%) without full margin life cycle cost analysis (-5) Major discretionary projects (>10%) without full margin life cycle cost analysis (-8) Major discretionary projects (>10%) without full margin life cycle cost analysis plus refusal to change	

			<b>Municipal Finance</b>	
0	4	0	<b>Pay - Go</b> 10-Pay-Go in bond language 8-Pay-Go in policies (need for tandem) 7-Pay-Go in policies (need for tandem) 4-Hybrid in current / Pay-Go in policies 3-Pay-Go option in current, no commitment in policies 1-No commitment to Pay-Go, Standard long term (-3) No commitment to Pay-Go, cabs since 2000, CABS in current (-5) No commitment to Pay-Go, abusive CABS (>4 Ratio, CABS in current)	
0	1	0	<b>Competitive Sale</b> 10-Competitive sale for all in bond language 8- Competitive sale for all new issuance in bond language 5,6-Competitive sale for all in policies 1-No commitment to competitive sales (-4) No commitment and past abuse with competitive	
0	2	0	<b>Did ALL of premium go to interest and sinking fund?</b> 10-All clearly went to interest & sinking fund in bond language 7-Some was diverted previously, prohibition in bond language 3-Some were diverted previously, prohibition in policies (-5) Regularly diverted and District claims it has legal authority to do	
0	1	0	<b>Competitive RFP for professional services</b> 10-Competitive RFP per GFOA in bond language 5-Competitive RFP per GFOA in policies 1-No commitment to competitive RFP	
0	1	0	<b>Non - contingent Advisor</b> 10-Commitment to non-contingent professional services per GFOA in bond language 5-Commitment to non-contingent GFOA in policies	
0	1	0	<b>Early Public Workshops of debt structures</b> 10-Commitment to public workshops on debt structures in bond language 5-Commitment to public workshops on debt structures in policies 1-No commitment to public workshops on debt structure	
			<b>Oversight and Transparency</b>	
0	1	0	<b>Independent BOC nomination</b> 10-All independent space nomination in bond language 7-All independent space nomination in policys 4-Some spaces in policies or some spaces in bond language 1-No commitment to independent nomination	
0	3	0	<b>Independent BOC Training</b> 10-Commitment to independent training in bond language 5-Commitment to independent training in policies 1-No commitment to independent training	
0	1	0	<b>Separate auditors for bonds</b> 10-Commitment to separate auditors in bond language 5-Commitment to separate auditors in policies 1-No commitment to separate auditors	

0	1	0	<p>BOC input on Performance Audit Scope</p> <p>10-Commitment to BOC audit scope input in bond language 5-Commitment to BOC audit scope input in policies 1-No commitment to BOC audit scope input</p>	
0	2	0	<p>Anti Pay to Play</p> <p>10-Anti Pay to Play requirement in bond language 5-Anti Pay to Play requirement in policies 1-No commitment to anti Pay to Play requirement (-5) No commitment anti-Pay to Play requirement and past harm notification</p>	
			<p><b>3.) Third Step - What has the performance of the District been in terms of administering past capital projects?</b></p>	
0	2	0	<p>Have their BOC's been active, well trained, and truly independent, or has their work been perfunctory?</p> <p>10-Monthly or quarterly meetings &amp; engaged , good annual reports, good Section 5 review 5-Quarterly meeting, annual reports issued, some Section 5 review 1-Some annual reporting <b>or</b> some missing reports (-3) Some annual reporting <b>and</b> some missing reports, <b>or</b> convincing evidence of stuffing alone (-8) Some annual reporting <b>and</b> some missing reports, <b>and</b> convincing evidence of stuffing</p>	
0	2	0	<p>Is there documentary evidence that all incentives paid on past Bond Projects have gone to either the building fund or the interest and sinking fund?</p> <p>10-All did, written district policy 5-Some did, some did not 1-Bad records (-3) Regular diversions (can be reduced to a 1 if included in bond language)</p>	
0	2	0	<p>How has the construction of the District compared to other local Districts on a per school, student, &amp; square foot basis?</p> <p>10-Costs lower than average of contiguous Districts 5-Costs within 20% of contiguous Districts 1-No commitment to analyze past cost or costs greater than 30% above contiguous districts</p>	
0	1	0	<p>How has the District faired compared to contiguous Districts in terms of change order \$ per square foot for similar projects?</p> <p>10-Costs lower than costs of average of neighboring districts 5-Costs within 20% of contiguous Districts 1-No commitment to analyze past costs or costs &gt;20% above average of contiguous Districts. (-5) No commitment to analyze costs and past costs greater than 20% above contiguous Districts</p>	
0	3	0	<p>What is the current debt level, and is the District operating on SBE waivers?</p> <p>10-No Debt 5-debt, but below limit or Pay-Go in bond language 1-Present offering will take to debt limit <b>and</b> no Pay-Go language in bond (-5) Will take debt above limit <b>and</b> no Pay-Go language in bond.</p>	
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## OVERSIGHT OBJECTIVES

There are a total of 600 points available in this analysis. Weighting is as developed in negotiations with School Districts from the Sacramento Area & other Counties utilizing Better Way Concepts. A score of 80% (480 points) with no negative or high concern areas is considered a high quality benchmark of District support. A score of 25% (150 points) or less is considered adverse for the District. Negative numbers are considered to be areas of high concern. Districts which exhibit extraordinary effort in some categories can receive double or "trailblazer" points.

The evaluation section of the effort is intended to be "objective" & fair for the community taxpayers as well as District achievements. The overall goal being a responsible quality effort at lower cost.