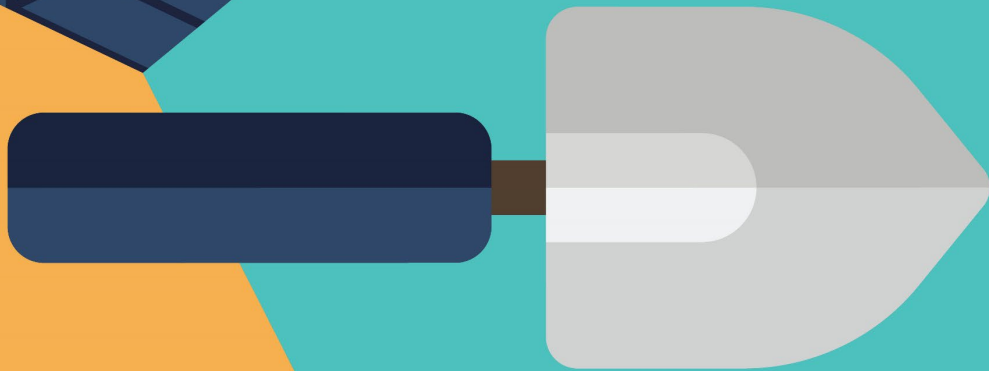
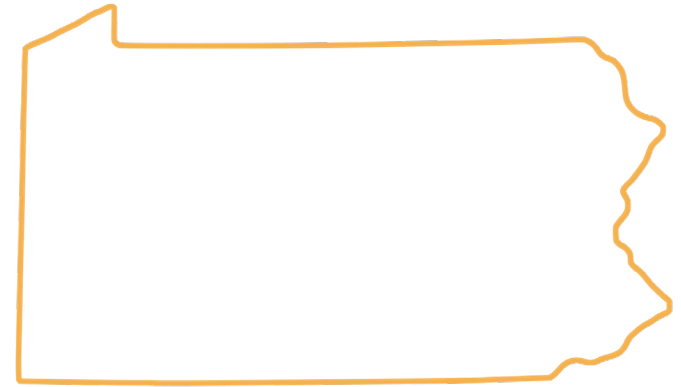


# READY, SET RELIEF



*Plan Well, Spend Wisely*



## **PENNSYLVANIA BREAKOUT SESSION**

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# Pennsylvania Presenters



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# PA ESSER III Funding Information

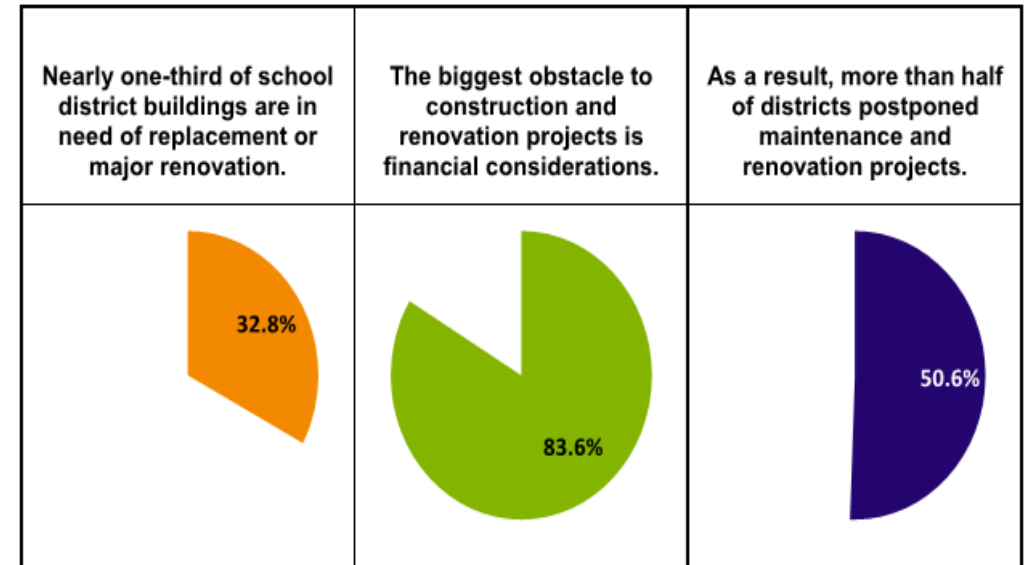
- **Given the amount of information surrounding ESSER funds we assume:**
  - You are aware of dates and deadlines information
  - You understand where/how to access funds
  - You are aware of your total allocation
  - PASBO has done a great job of outlining PA uses and accounting rules around ESSER Funds
  - PASBO also warns to use extreme caution around funds via lessons learned from ARRA Funds
- **If you are unaware of any item above**, contact Phil Solomon to receive the required documentation.

# PA ESSER FUND PUBLIC POSITIONING AND ACT 1 TAXING QUESTIONS

- **Address concept of “Windfall” of Federal Funds:**

- PlanCon has been on hold since 2016
- Although PA has promised to help fund education, it has underfunded the facilities portion significantly
- If ESSER funding is used to address deferred maintenance, it can easily be positioned that you are merely addressing unfunded mandates. As deferred maintenance is addressed IAQ is improved as well.
- Even with ESSER Funding; the need for tax increases may persist as labor market tightens and material costs increase with inflation

Since the moratorium on new PlanCon applications took effect in 2016 school buildings have continued to deteriorate.



2017 State of Education report based on a survey of superintendents (available at [www.psba.org](http://www.psba.org)).

**Now more than ever, the adequacy, safety and maintenance of facilities is in focus.**

- **2021 Infrastructure Report Card**
  - **53%** of schools need to upgrade ventilation
  - **33%** have capacity issues
  - National funding gap **\$38 billion/per year**
- **Current Pennsylvania Public School state gap as identified in this report: \$1.41 billion**

## 2021 Infrastructure Report Card

- **53%** of schools need to upgrade ventilation
- **33%** have capacity issues
- National funding gap **\$38 billion/per year**

**D+**

# Planning of Funds

- The number of vendors coming out of the woodwork to provide “COVID HVAC solutions” has been noteworthy.
- Given the “cliff” of funding, careful planning must be utilized to avoid traps similar to ARRA era mistakes
- Some districts’ have floated innovative plans with the funds already, some have approaches that appear reactionary.
- If the intent is to improve IAQ while reducing the impact of infectious disease transfer (all types not just COVID) there are specific proven strategies adopted by ASHRAE (covered later in presentation). Additional benefits to IAQ (COVID 19 Commission – The Lancet).
- The most important advice is to stop and plan, do not just act due to internal or external pressure to **“DO SOMETHING”**





# Strategic Approach

**Step 1 - Identify team and resources to outline district priorities (cross-sectional teams)**

**Step 2 – Perform needs assessment (all areas of competing applications for funds)**

- 'Dust off' old facilities reports or create one if it does not exist
- Review and reprioritize facility needs in light of COVID era
- Identify deferred maintenance that could be funded by ESSER Funds (All IAQ and related work)
- Ability to control/address IAQ may make the difference in keeping students in school while addressing parent/faculty/staff safety concerns or sending kids back to cyber learning platforms.

**Step 3 – Prioritize needs using a decision matrix**

- The more you can use a data driven approach to support decisions the better
- Use of these funds will be scrutinized by internal and external stakeholders. It is wise to have justifications prepared before the questions/accusations are leveled



# Strategic Approach (Continued)

## Step 4 – Outline solutions to address needs

- Solutions should be data driven and fact based (easily displayed to community)
- Should identify all financial resources available to the district to implement
- All outcomes should provide long-term value to the district to address current and future limitations

## Step 5 – Implement solutions in accordance with all state and federal guidelines (facilities portion)

- In PA, there are two main delivery mechanisms that are applicable for these funds for facilities:
  - Traditional Plan & Spec (Design, Bid, Build)
  - PA Guaranteed Energy Savings Act (GESA - Design/Build implementation)
- Both are valid, but the contractual front end must be modified for the use of these funds

**NOTE:** Many of the alternative purchasing routes typically available are either not approved or not recommended for construction (COSTARS, etc.) **DO NOT MEET** Federal UG standards.





# Strategic Approach (Continued)

**Step 5** – Implement solutions in accordance with all state and federal guidelines (facilities portion)

## **Traditional plan and specification approach**

- Use standard process add language for UG
- Be mindful of how change orders may impact funding/planning (retrofit work, unforeseen conditions)
- Consider the use of a Construction Manager or Owner Representative to help support facilities staff which may already be overburdened with day-to-day issues surrounding COVID

## **GESA – Guaranteed Energy Savings Act**

- Ideally this process lowers the district's facilities operating cost in the future, which can be used to 'fund' additional maintenance costs (higher rated filtering, more outdoor air, preventative maintenance, etc.)
- Has built in future monitoring of the project which could be used to support the ongoing quarterly reporting requirements (to PDE) for your use of the funds.
- Target the funds to areas that only improve IAQ and infectious disease control (limits comingled funds)
- May help augment facilities staff since PM and technical support are part of process

# Strategic Approach (Continued)

**Step 5** – Implement solutions in accordance with all state and Federal Guidelines (Facilities portion)

For Either Approach must follow Federal Guidelines (Uniform Guidance):

- Specific process outlined for Procurement activity documentation trail (Both traditional and GESA)
- Minority/Disadvantaged Business Enterprises (M/DBE) solicitation

Universal Guidance (UG) clauses necessary in solicitations:

Universal Guidance Clauses	ESSER Funds via Construction
○ Termination of Cause	○ Debarment and Suspension
○ Equal Employment Opportunity	○ Byrd Anti Lobbying
○ Contract Work Hour and Safety Standards Act	○ Clean Air Act
○ Davis Bacon Act	○ Simplified Acquisition Threshold Contract Breach
○ Rights to Inventions	○ <b>Currently collaborating with Fox Rothchild LLP to outline how construction documentation language must be modified for UG</b>



# Strategic Approach (Continued)

**Step 6** – Internally account for all funds in accordance with state and federal guidelines

## Statement from PASBO

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*"This is both an economic and political situation. Very important to carefully plan the use of these funds...state and federal funding may hang in the balance... Internal and external stakeholders will be watching how these funds are used."*



# What Should Schools be Doing Right Now?

- Take a breath and a step back to be strategic with this funding opportunity.
- Rebuild connections with students, families and shift operations to the needs of the students and community.
- Focus on the three areas below:

**#1**

What do we need for  
immediate relief?

**#2**

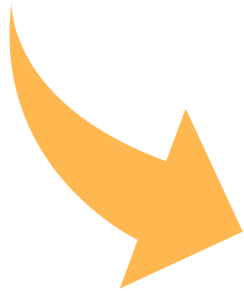
What intermediate  
needs will we have in  
the next 6-12  
months?

**#3**

What shifts are needed in  
existing operations and  
assets to meet this future  
need?

## AVAILABLE TOOLS & RESOURCES

- ASHRAE/CDC Position Documents
- Designing infectious disease resilience into school buildings
- ASHRAE position document on infectious aerosols
- CDC Guidelines for Ventilation: <https://www.cdc.gov/coronavirus/2019-ncov/community/schools-childcare/operation-strategy.html>
- ICS Healthy Buildings Checklist: [www.ics-builds.com](http://www.ics-builds.com)
  - Facility assessments, prioritization, strategic planning, and other resources available
- Facilities health checklists – reach out to Phil Solomon



**ICS Facilities Health Checklist**

Educational Vision		Operations/Maintenance			
	Yes	No		Yes	No
1. Does your long-range facilities plan align with your educational vision?	<input type="checkbox"/>	<input type="checkbox"/>	1. Do you know the annual cost of emergency services in your district?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are your classrooms and spaces conducive to the programming you envision today and in the future?	<input type="checkbox"/>	<input type="checkbox"/>	2. Does the district have a preventative maintenance schedule?	<input type="checkbox"/>	<input type="checkbox"/>
3. Would your teachers/principals agree that you have appropriate learning spaces?	<input type="checkbox"/>	<input type="checkbox"/>	3. Are your preventative maintenance services done in-house or outsourced?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does this plan have a funding path?	<input type="checkbox"/>	<input type="checkbox"/>	4. Does the district track/manage the cost of preventative maintenance?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Infrastructure Renewal Plan</b>					
1. Do you know when major building systems need to be replaced and in	<input type="checkbox"/>	<input type="checkbox"/>	5. Does your district track and report maintenance using maintenance	<input type="checkbox"/>	<input type="checkbox"/>

HEALTH & SAFETY	YES	NO
1. Are ceiling tiles sagging or appear wet/stained?	<input type="checkbox"/>	<input type="checkbox"/>
2. Is there an odor of mold or dampness?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do the windows have moisture on the inside?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is there frost build up on doors or windows?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do doors stick in summer but not in winter?	<input type="checkbox"/>	<input type="checkbox"/>
6. Are there bubbles in or gaps between vinyl flooring tiles?	<input type="checkbox"/>	<input type="checkbox"/>
<b>INDOOR AIR QUALITY</b>		
	YES	NO
7. Test and Balance: is a current T&B report available showing airflow to occupied spaces, outside air and exhaust CFMs vs design?	<input type="checkbox"/>	<input type="checkbox"/>
7a. Do all values fall within 10% of design?	<input type="checkbox"/>	<input type="checkbox"/>
8. Are supply, return, intake, and exhaust openings clear of obstructions?	<input type="checkbox"/>	<input type="checkbox"/>

INDOOR AIR QUALITY (continued)	YES	NO
9. Do control devices operate as designed? (BAS and also dampers and valves)	<input type="checkbox"/>	<input type="checkbox"/>
10. Is air distributed evenly throughout occupied spaces?	<input type="checkbox"/>	<input type="checkbox"/>
11. If filtration levels have been changed during the pandemic, have fans/motors been adjusted to meet additional pressure drop?	<input type="checkbox"/>	<input type="checkbox"/>
12. Can building automation system alert you if part of the ventilation system is not operational (eg supply fan is off or filters are plugged)?	<input type="checkbox"/>	<input type="checkbox"/>
13. Are trendlogs set up to confirm air delivery and/or flag problems?	<input type="checkbox"/>	<input type="checkbox"/>

If you answered "NO" to any of the questions above, contact your controls contractor or ICS to improve your indoor air quality.

Please contact Phil Solomon at (215) 479-3543 or [phil.solomon@ics-builds.com](mailto:phil.solomon@ics-builds.com) for more information



# Q&A







# Stay Connected with ICS

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