

*The following glossary is intended to define terms frequently used in OFCC programs or in the construction industry. They do not represent all legal requirements. Specific legal definitions are found in the Standard Contracts used by the Commission and other public owners.*

**0% Variance:** A provision of the Ohio School Design Manual allowing districts to reduce the square footage of their PreK-5<sup>th</sup> grade classrooms by 10% for the purpose of class size reduction. Districts choosing to incorporate **Extended Learning Areas** (see below) into their building designs may apply the 10% variance to all grade levels.

**2/3 Guideline:** The guideline that sets the replace versus renovate standard for school facilities at two thirds of the cost of a new building.

**350 Rule:** A provision of the Ohio Revised Code requiring a minimum of 350 students in any building co-funded by the OFCC. The commission may grant waivers to this requirement under certain circumstances.

**9.312 Responsibility:** Ohio Revised Code sets out factors to consider in determining whether a bidder is responsible. State agencies or political subdivisions use several criteria to evaluate potential bidders and including, but is not limited to, such factors as: compliance with all material requirements, experience of the bidder, and conduct and performance of the bidder on previous contracts.

**Appraisal:** Part of the assessment process that includes a review of the school site, structural and mechanical features, plant maintainability, building safety and security, educational adequacy, and an assessment of the building to provide for adequate educational delivery. The assessor weighs each of these factors and points are assigned to each out of a total number of points possible.

**Architect Selection:** The process by which a professional design firm for the project is engaged. For any contract in which the estimated design services fee is over \$25,000, Ohio's Design Professional Selection Law (O.R.C 153.65:153.71) requires public owners to 1) publicly announce the availability of each contract for professional design services; 2) evaluate the qualifications of interested professional design firms; and 3) negotiate a contract with the most highly qualified firm. Only after selecting the top firm does the public owner enter into fee negotiations.

**As-Built Documents:** Documents including but not limited to Drawings, Addenda, Specifications, executed Change Orders, and other elements of the Contract Documents which the Contractor annotates and otherwise modifies to indicate changes made during the construction process, the location of concealed and buried items, and other information useful to the Owner throughout the life of the completed Project.

**Assessed Valuation:** Estimated value placed upon land for purposes of taxation; this value is not necessarily indicative of the fair market value of the property.

**Assessment:** The process of evaluating all aspects of the current facilities for a public owner. Each building is evaluated based on specific criteria to determine what systems need repaired or replaced. The assessment becomes the basis for formulating the master facility plan.

**Assessment Consultant:** A professional hired by the Commission to conduct a detailed facility assessment on a building to determine a renovation cost.

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**Assessment Only Program:** A program that allows any school district that has not received an assessment by OFCC to request one. This is a stand-alone program that does not obligate a district to commit to a master plan or continue in any other OFCC program.

**Auditeria:** A K-12 space that combines the eating and performance areas of a building. Auditerias have stepped floors.

**Average Daily Membership (ADM):** Average number of students present and absent in a school district during a school year or other specified period of time.

**Bidding Process:** A process by which firms may be selected to conduct work. The Ohio Facilities Construction Commission uses an on-line bidding system for this purpose. The process includes an advertisement for the scope of work, acceptance of bids, an evaluation of bids and bidders, and an award to the lowest responsive and responsible bidder.

**Bond:** A legal document submitted by the Contractor to provide assurance that the Contractor will perform the work of the contract, including making required payments to subcontractors and material suppliers.

**Bond Counsel:** Serves as a legal authority on bond projects; advises the public owner on such issues during the construction process.

**Bracketing:** An exercise that takes place during the Master Planning and Program of Requirements phase of design using formulas set forth in the Ohio School Design Manual to calculate the amount of space to be allocated for all areas of the facility based on student enrollment.

**Budget Increase:** Any amount over the initial project budget that cannot be otherwise absorbed by the budget. Any increase on a K-12 project will be co-funded proportionally by the school district and the state based on availability of state funds.

**Building Information Model:** A digital representation of physical and functional characteristics of a facility. It provides a shared knowledge resource for information about a facility forming a reliable basis for decisions during its life cycle, which is defined as existing from earliest conception to demolition.

**Builder's Risk Insurance:** Insurance which covers new structures as they are being built as well as the materials (steel, plumbing, lighting fixtures, etc.), which are intended to become an integral part of the structure.

**Building Envelope:** Includes all elements of the building that separate the interior of the building from the outdoor environment, including the windows, walls, foundation, basement, slab, ceiling, roof, and insulation.

**Cafetorium:** A K-12 space that combines the eating and performance areas of a building. These spaces have flat floors.

**Career-Technical Planning District (CTPD):** A local education agency configuration (comprehensive district, compact/contract district or joint vocational school district) that meets the minimum requirements of law and subsequent standards to offer state sanctioned career-technical programming (source: Ohio Department of Education).

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**Change Order:** Written authorization to add, delete or otherwise change an item in a construction contract to be signed by the owner, architect, OFCC and contractor. Implies a change in the contract sum, time to complete the portion of the project, or both.

**Classroom Facilities Assistance Program (CFAP):** Main program through which K-12 school districts are funded for renovation and replacement of school buildings.

**Co-located or Joint-Use/Shared Facilities:** A type of public facility that houses multiple occupants. For example, a school facility may be combined with other community needs such as a community health clinic, a public library or a social services outreach facility. OFCC supports these types of initiatives, although some facility spaces may require locally funded initiatives and/or support from capital partners.

**Commissioning Agent (CxA):** Employed directly by the public owner to assure that certain building systems will function within the parameters established as the basis for their design. Early in the design process, the agent establishes a Commissioning Plan to be followed throughout the design and construction phases of the project. The Commissioning Plan establishes operational objectives, monitors installation procedures, and incorporates functional testing protocols.

**Compact/Contract District:** A form of a Career Technical Planning District, or legal entity through which career-technical programs are delivered. It is an area in which a number of school districts enter into a contract of operation to provide career-technical education (source: Ohio Department of Education).

**Comprehensive District:** A form of a Career Technical Planning District, or legal entity through which career-technical programs are delivered. It is one that has 1,500 or more students and offers career-technical education in career centers and/or at existing high schools in the district (source: Ohio Department of Education).

**Constructability Review:** An estimation of the readiness of a construction project based on project plans and specifications.

**Construction Documents:** The written documents that define the roles, responsibilities, and the scope of work under the construction contract, and are legally-binding on the Public Owner and contractor or design firm. The specific documents are defined in the contract.

**Construction Manager at Risk (CMR):** A delivery method which entails a commitment by the Construction Manager (CM) to deliver the project within a Guaranteed Maximum Price (GMP), reducing financial risk for the public owner. The GMP is based on the construction documents and plan specifications. The CMR accepts responsibility for any costs not included in the GMP and not covered by approved change orders. The CMR provides professional services and acts as a consultant to the owner in the design development and construction phases. The CMR may also provide some of the actual construction of the project depending on the availability of bidders and the expertise the company has.

**Controlling Board:** Legislative body comprised of the Director of the Office of Budget and Management, or his or her designee, and six members of the Ohio General Assembly. The board provides legislative oversight over certain capital and operating expenditures by state agencies and has approval authority over various other state fiscal and purchasing activities. All funds provided to public owners through OFCC funded programs must be approved by Controlling Board.

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**Cooperative Purchasing Program:** A group buying program managed by the Ohio Department of Administrative Services that offers Ohio counties, townships, municipalities, school districts, public libraries, regional park districts and other political subdivisions the benefits and costs savings of buying goods and services through state contracts.

**Core Academic Space:** Spaces outlined in the Ohio School Design Manual that are the primary areas in which K-12 instruction and learning take place. Academic core spaces include project laboratories, classrooms, teacher prep/workrooms, instructional material storage rooms, individual restrooms, special education delivery areas, and small group breakout rooms or extended learning areas.

**Design Development phase (DD):** Project phase in which the public owner and its architect work together to develop the designs for the new or renovated facilities.

**Criteria Architect:** On a Design-Build administrated project, it is the architect or engineer retained by the public owner to prepare conceptual plans and specifications and, if requested by the Owner, to serve as the representative of the Owner and to provide other design and construction administration services on the project.

**Design-Build (DB):** A project delivery system which both the design and construction services are contracted by a single entity. The system relies on a single point of responsibility to minimize risks for the project owner and to reduce the delivery schedule by overlapping the design phase and construction phase of a project.

**Design Professional (DP):** A firm chosen to design a public owner's facilities. Large-scale projects often have more than one DP.

**Discrete Portion:** The portion of the master plan a district agrees to build using local funds as part of its Expedited Local Partnership Program agreement.

**Easements/Rights of Way:** A right acquired for access to or over, or for use of, a portion of land owned by another entity for a specific purpose, such as a driveway or public utilities channel.

**Educational Planner:** A professional firm that works to develop enrollment projections, long-range facility plans, and other information as needed for support of K-12 districts and the OFCC in making facility decisions.

**Eligibility Ranking List:** A ranking of all school districts in Ohio from lowest to highest based on adjusted valuation per pupil. This list is provided annually to OFCC by the Ohio Department of Education. The OFCC uses a three-year average of past rankings to determine the order in which districts are served. (See also **Equity List**).

**Enrollment:** Number of students attending a K-12 school district, as reported by the district to the ODE. OFCC uses this number to project enrollment for planning purposes.

**Equity List:** Produced annually by the Ohio Department of Education that ranks all school districts from lowest to highest in terms of adjusted valuation per pupil. (See also **Eligibility Ranking List**).

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**E-rate:** A federal program administered by the Schools and Libraries Division of the Universal Service Administrative Company that provides discounts on telecommunications services and infrastructure start-up costs to eligible public and non-public schools. The level of discount is determined based on the percentage of students in the district or building who are eligible for the free and reduced lunch program (National School Lunch Program). Services eligible for discounts may include but are not limited to: dial up or direct Internet connections, email, basic phone services, leased data circuits, and acquisition or installation of equipment to provide internal connections.

**Exceptional Needs Program (ENP):** A program created to assist K-12 districts with urgent health and safety issues in their facilities that are more than three years away from expected funding through CFAP.

**Excess Area:** OSDM compliant space in an occupied facility used to serve a district's educational needs but exceeding the space required under OSDM guidelines to serve the student population assigned to the building. Excess Area is calculated building wide and equals the area of the building minus the area required to serve the number of students assigned, minus all Oversize Design Manual Space, minus all Oversize Non-Design Manual Space, minus all Oversize Unusable Space. During Master Planning, Excess Area is reduced by increasing the number of students served within the occupied facility.

**Executive Partnering Meeting:** In K-12 projects, a meeting of school board members, the district superintendent, building principals, department heads, architects, engineers, OFCC representatives, and other stakeholders that occurs shortly after establishment of project scope and budget. The meeting's purpose is to establish a working relationship with other members of the planning and design team. Roles are defined along with schedules and other objectives that must be met for the project to be successful. Best practices as well as pitfalls are discussed and efficient communication channels are established.

**Expedited Local Partnership Program (ELPP):** A program that allows K-12 districts to begin their facilities project with local funds instead of waiting for state dollars to become available.

**Extended Learning Areas (ELAs):** Dedicated formal or informal spaces outside of the typical classroom that provide space for students to engage in varied instructional and social activities. The Ohio School Design Manual for 2005 and beyond allows for a 10% reduction in classroom square footage to provide ELAs throughout a school.

**Facility Assessment:** A comprehensive inspection of a building that includes a report indicating the condition of each aspect of the building and whether it needs repair, replacement or no action. This report is the basis for generating master facilities plans. (See also **Appraisal**)

**General Contractor (GC):** (Also known as **Single Prime Contractor**) A main contractor or prime contractor responsible for the day-to-day oversight of a construction site, management of vendors and trades, and the communication of information to all involved parties throughout the course of a building project. Responsible for the general coordination of a project.

**General Revenue Fund (GRF):** Primary operating fund of the State of Ohio.

**Gross Square Footage:** Area including corridors, restrooms, showers, storage spaces and other features of a facility.

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**Half-Mill Maintenance Requirement:** State law that requires every K-12 district participating in OFCC programs approve a half-mill property tax in addition to their construction levy in order to assist with the funding necessary to maintain the building over its lifetime. Districts may also use existing taxes or other available revenue to meet the requirement.

**High Performance Buildings:** Also referred to as “green buildings,” these facilities are designed to offer superior performance in a variety of areas related to sustainability, including but not limited to: energy and water efficiency, waste management and air emissions, and longevity (durability and adaptability of the building to changing user needs). Since 2007, all K-12 buildings in OFCC-funded programs are required to be designed to standards found in the LEED® For Schools initiative with the goal of achieving a LEED Silver certification with an emphasis on energy (See also **LEED Certification**).

**Joint Vocational School District (JVSD):** A form of a Career Technical Planning District, or legal entity through which career-technical programs are delivered. It is an area that serves two or more adjacent school districts and is governed by a joint vocational school board consisting of representatives from the participating districts. (source: Ohio Department of Education)

**LEED Certification:** A credentialing program for buildings that meet specific criteria as a high performing or environmentally sound building. The LEED (Leadership in Energy and Environmental Design) Green Building rating system was created by the U.S. Green Building Council and includes items such as: building life cycle cost, sustainability, energy efficiency and the use of environmentally sensitive materials.

**Local Education Agency (LEA):** A public board of education or other public authority legally constituted for either administrative control or direction of elementary schools or secondary schools.

**Locally Funded Initiative (LFI):** Any portion of a project that is an addition to the agreed-to master facility plan. LFI's are solely funded by the district. OFCC works with the district to integrate LFIs into the overall master plan but does not share the cost of the additional items.

**Local Share:** The legally mandated percentage of the total budget on a K-12 project that the local district is responsible for securing.

**Maintenance Plan:** A comprehensive plan for the long-term care and upkeep of every building in the school district. This is a requirement for all districts participating in OFCC programs.

**Maintenance Plan Advisor (MPA):** Hired by the school district to provide a detailed plan to service, maintain and prolong the life of the facilities using the maintenance fund.

**Master Facility Plan (MFP):** The comprehensive plan for repairing and/or replacing the educational facilities of a district.

**Memorandum of Understanding (MOU):** A formal document that summarizes a commitment or agreement between two or more parties in relation to a facility project. This signed statement may provide an understanding of participation in a joint or shared-use facility arrangement, for example.

**Net Bonded Indebtedness:** Net amount of principal and interest remaining to be paid from a bond issue.

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**Net Square Footage:** Implies the actual size of the room, disregarding utility closets, restrooms and other portions of a classroom.

**Notice of Intent to amend (NOI):** A formal document signed after a school board resolution is passed that makes an adjustment to the scope of project. This typically involves a budget adjustment to a co-funded project expense.

**The Ohio Revised Code (ORC):** The comprehensive set of statutes governing Ohio.

**Ohio School Design Manual (OSDM):** An extensive document that sets construction standards for all OFCC projects to ensure statewide equity and quality for school facilities.

**Oversize Design Manual Space:** Certain core area or common spaces (gymnasium, media center, kitchen, dining area, Ag. Ed., vocational, and corridors) where existing square footage exceeds that recommended in the design manual. The amount by which the area in each space exceeds the design manual recommended square footage is the oversize space. Oversize Design Manual Space is not used in calculating the student capacity of the building.

**Oversize Non-Design Manual Space:** Spaces used for school use but not included in the design manual (auditoriums, natatoriums, indoor tracks) and space used for non-school use (adult education, board offices, or county programs or other agencies). This space is not used in calculating the student capacity of the building.

**Oversize Unusable Space:** Space, which, by its physical configuration or nature, is not suitable for use as classrooms or other program areas (all or part of a basement or a clock tower). This space is not used in calculating the student capacity of the building.

**Partnering Program:** A project and dispute management model that brings the team together to resolve issues and manage the construction in an efficient way. Partnering meetings are held throughout the design and construction process. (See also **Executive Partnering**).

**Phase Submission Form:** A checklist of documents that must be provided to OFCC at each phase (Program of Requirements, Schematic Design, Design Development, and Construction) of the project.

**Phase I Environmental Assessment:** An assessment of an existing or proposed building site by a qualified professional that identifies any environmental liabilities or issues of concern on the site. Items to be investigated include but are not limited to: current and past uses of the property, whether underground storage tanks are present, and existence of contaminants. A Phase I assessment is required as part of the district's due diligence in selecting a "buildable" site.

**Phase II Environmental Assessment:** A more thorough investigation of a site that may be required should the results of the Phase I Assessment reveal questions concerning possible contamination. Extensive sampling and testing of soils, groundwater, and asbestos-containing materials are performed.

**Planning Manager (PM):** The OFCC staff person overseeing the development of the master facilities plan.

**Post-Occupancy Evaluation:** A review of a building and its usefulness to occupants once it is completed and has been in use for some time. Evaluation items might include: whether occupants are satisfied with spaces inside the building; the functionality of certain spaces; and what might be changed in the building design in the future.

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**Preventative Maintenance Program:** An OFCC program through which K-12 districts create a plan to provide for ongoing preservation and repairs of the building's mechanical and other systems. The plans are usually created with the assistance of a Maintenance Plan Advisor.

**Program of Requirements (POR):** Element of the design process that establishes the number and types of spaces a K-12 district or career technical school will need to serve their students.

**Program Space:** Refers to all spaces that are usable or may be occupied in the OFCC's standard bracketing tool. The calculation encompasses all spaces within a building minus a "construction factor" of 10-12% to account for walls, plumbing chassis, and other such non-usable spaces.

**Project Agreement:** The contract between the state and the school district.

**Project Budget:** The total estimated cost of the scope of work for the project.

**Project Closeout:** K-12 program process by which all outstanding invoices are resolved, a fiscal reconciliation occurs, warranty periods begin, and the district and the OFCC end their partnership.

**Project Completion Certificate:** A form used to certify that a vendor has satisfactorily completed all aspects on a contract. Project Completion Certificates are issued following a final inspection of the designated work.

**Project Construction Fund (Fund 010):** A specific fund required by the state into which all state and local project funds are deposited. Any funds for maintenance or locally funded initiatives must be deposited in a separate fund.

**Project Manager (PM):** The OFCC staff person overseeing a construction project.

**Punch List:** A list of missing or deficient items identified upon inspection of all work performed. The inspection occurs after the owners have received notice that the work is complete and compliant with the project documents. When all corrections are accomplished a final inspection is made. All items on the list must be completed, repaired, or replaced prior to issuance of a Certificate of Completion.

**Regional Program Consultant (RPC):** Responsible for coordinating, managing, monitoring and planning for the resources required and the schedule for the facilities assessment, enrollment study, and the Master Facilities Plan for assigned school districts. For non-funded programs, the RPC reviews plans and specifications for Design Manual compliance, reviews budget estimates prepared by the Design Professional or Construction Manager, Design-Builder, or General Contractor, and provides various services during the construction phase of the project.

**Schematic Design phase (SD):** In this phase of the project, the building's required spaces are developed and organized into functional groupings represented by bubble diagrams created by the Design Professional. This design includes orientation of building circulation patterns and service systems. The Schematic Design is reviewed and approved by the project team prior to starting the Design Development phase.

**Short-List:** A list of applicant firms that have been deemed suitable and from which the successful firm will be chosen. Construction Managers, Design-Builders, and Design Professionals are short-listed in the OFCC review process.

**Square Foot Allowance:** The Ohio School Design Manual specifies the amount of square footage that will be co-funded for each type of space. Additional square footage is counted as a locally funded initiative.

**Substantial Completion:** The stage in the progress of the Work when it is sufficiently complete that the Owner can utilize the Work for its intended use, as determined by the Architect.

**Teaching Station:** Refers to teaching/learning spaces that are calculated by dividing the total projected student enrollment by the planning standard of 25:1 student teacher ratio. A utilization factor of 85% is applied to middle and high school buildings to account for the fact that at these grade levels classrooms or teaching stations are occupied an estimated 85% of the time. Music rooms, technology education, gyms and other such spaces are included in the calculation for upper grade levels only; in elementary buildings, only classrooms are considered to be teaching stations.

**Value Engineering:** A process that reviews building designs for opportunities to reduce the project budget.

**Variance:** A request for use of materials and systems not specified in the Design Manual.

**Variance Committee:** The OFCC staff that reviews variance requests and makes recommendations to the Executive Director for approval or denial.

**Waiver:** The allowance for exempting a district from a specific policy of the agency such as the 2/3rds guideline or the provision of law requiring a minimum of 350 students in any OFCC co-funded building.

**Warranty Period:** The period during which system the manufacturer corrects failures or other problems without charge.

*Updated May 2020*