

## Introduction of Plancon

Pennsylvania law charges local boards of education with the responsibility of providing “necessary grounds and suitable school buildings to accommodate all the children between the ages of six and 21 years. . . . so that every pupil in any such building may have proper and healthful accommodations” (Section 701 of the Public School Code of 1949, as amended). For the most part, the determination of what constitutes “necessary grounds and suitable school buildings” is a local decision and one that is determined by the board of directors of each school district.

When a school district undertakes a major project and seeks reimbursement from the Commonwealth of Pennsylvania, a process known as PlanCon is initiated. PlanCon, an acronym for Planning and Construction Workbook, is a set of forms and procedures used to apply for Commonwealth reimbursement. The forms are designed to: (1) document a local school district’s planning process; (2) provide justification for a project to the public; (3) ascertain compliance with state laws and regulations; and (4) establish the level of state participation in the cost of the project.

PlanCon is divided into 11 parts. In order to ensure local participation, each part is submitted individually after board action. Following is a brief description of each part.

### **Part A, Project Justification:**

Provides the description of a proposed project and the justification of its need.

### **Part B, Schematic Design:**

Is a technical review conference of the conceptual drawings, site plan and educational specifications. The architect and a district administrator who is knowledgeable about the project and the educational program must be present at the schematic design conference.

### **Part C, Site Acquisition:**

Deals with the acquisition of land for school building projects or the purchase of a building for school or district administration office use. This part is completed only if land is acquired or a building is purchased as part of the scope of the project.

### **Part D, Project Accounting Based on Estimates:**

Is concerned with estimated project costs. In this part, various “tests” of a district’s financial ability to make payments are performed, as required by Section 21.51 of the State Board of Education Regulations. This part also

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addresses the requirements for public hearings on school building projects, as required by Sections 7-701.1 (also known as Act 34) and 7-731 of the Public School Code of 1949, as amended. PlanCon Part D also provides an estimate of state reimbursement.

### **Part E, Design Development:**

Is a conference to review the architectural aspects of a project when the design is fully developed. The architect and a district administrator must be present at this review conference.

### **Part F, Construction Documents:**

Provides for further refinement of the architectural aspects of the project and documentation that other state and local agency requirements have been met or will be met before entering into construction contracts. Departmental approval of PlanCon Part F authorizes a district to receive bids and enter into construction contracts.

### **Part G, Project Accounting Based on Bids:**

Is concerned with actual construction bids. A project's eligibility for reimbursement is ultimately determined at PlanCon Part G. The average time frame from submission of PlanCon Part A to approval of PlanCon Part G is approximately one year.

### **Part H, Project Financing:**

Addresses the financing used for a project. Calculation of the temporary reimbursable percent for a project's financing occurs at PlanCon Part H. Once PlanCon Part H is approved, reimbursement on a project commences.

### **Part I, Interim Reporting:**

Provides for the reporting of change orders and/or supplemental contracts during construction.

### **Part J, Project Accounting Based on Final Costs:**

Is the final accounting for the project. The permanent reimbursable percent is calculated at PlanCon Part J.

### **Part K, Project Refinancing:**

Is used if reimbursable bond issue is refunded, refinanced or restructured.