



BHCIP BH Planning Grantee Kickoff Informational Webinar

BUILDING

Access

Infrastructure

Equity

Workforce

Careers

Competencies

Health

Hope

Community

Connections

Independence

Solutions



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AGENDA

- Welcome and Congratulations!
- Program Summary & Requirements
- Introduction to Real Estate Development Planning
- SOW Template and Instructions



Congratulations! Round 2B BH Planning Grantee Map

14

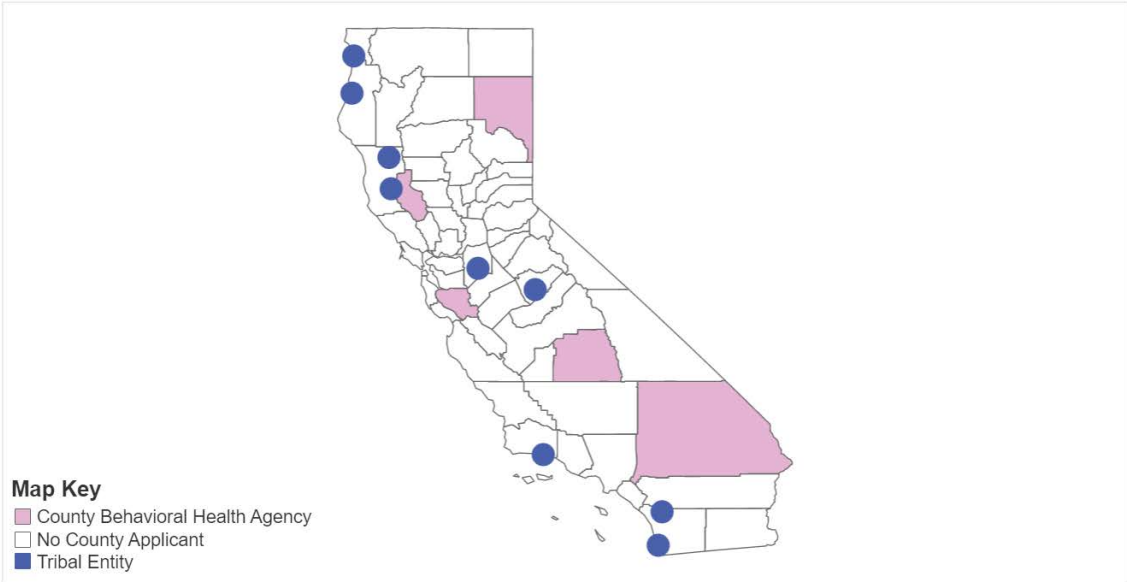
Grantees

9

Tribes

5

County Behavioral Health Agencies



Objective: “Expand behavioral health infrastructure capacity, targeting state level priorities”

Keep in mind:

DHCS encourages grantees to partner regionally & collaborate

Planning grants can be used to plan for both BHCIP and CCE projects

Submission of Action Plan by June is best to take advantage of other funding rounds

Minimum Elements of an Action Plan

- Identify Project Director / Lead
- Overall goals, objectives, strategies, timeline
- Planned BHCIP and CCE projects & funding rounds to apply to
- Infrastructure gaps, challenges, barriers, and strategies & solutions using BH Needs Assessment & Local Data
- Outline of Partnerships for implementation
- Staffing Plan for planned projects – including strategies for recruiting and retaining diverse and multicultural staff including those who are Black, Indigenous, and People of Color, to ensure culturally competent services to underserved communities
- Required resources for implementation and steps to secure them

Action Plan: Key Inputs



Diverse Stakeholders & System Delivery Partners

- County or tribal representatives
 - Health care providers
 - BH/SUD providers
- Community clinics & health centers
 - Real estate developers
- Individuals & family members who have lived experience with BH conditions

Action Plan: Data Driven Planning



DHCS BH Needs Assessment &
Local Data

Predevelopment Activities

May begin after approval of the Action Plan

As listed in the RFA:

- Identification of potential development sites
- Identification of buildings for rehabilitation or expansion
- Identification of potential developers and brokering relationships
- Identification and application for additional resources for capital, services, and operating costs
- Land/site development and other appropriate reviews
- Addressing local siting challenges
- Community and provider engagement via onsite and virtual meetings
- Predevelopment costs to assess the viability of the project

Future Funding Rounds

Joint RFA

BHCIP Round 3 Launch Ready

- Round 2: May 31

CCE

- Rolling Application
- Predevelopment funds also available

Round 4: Children & Youth
(June 2022)

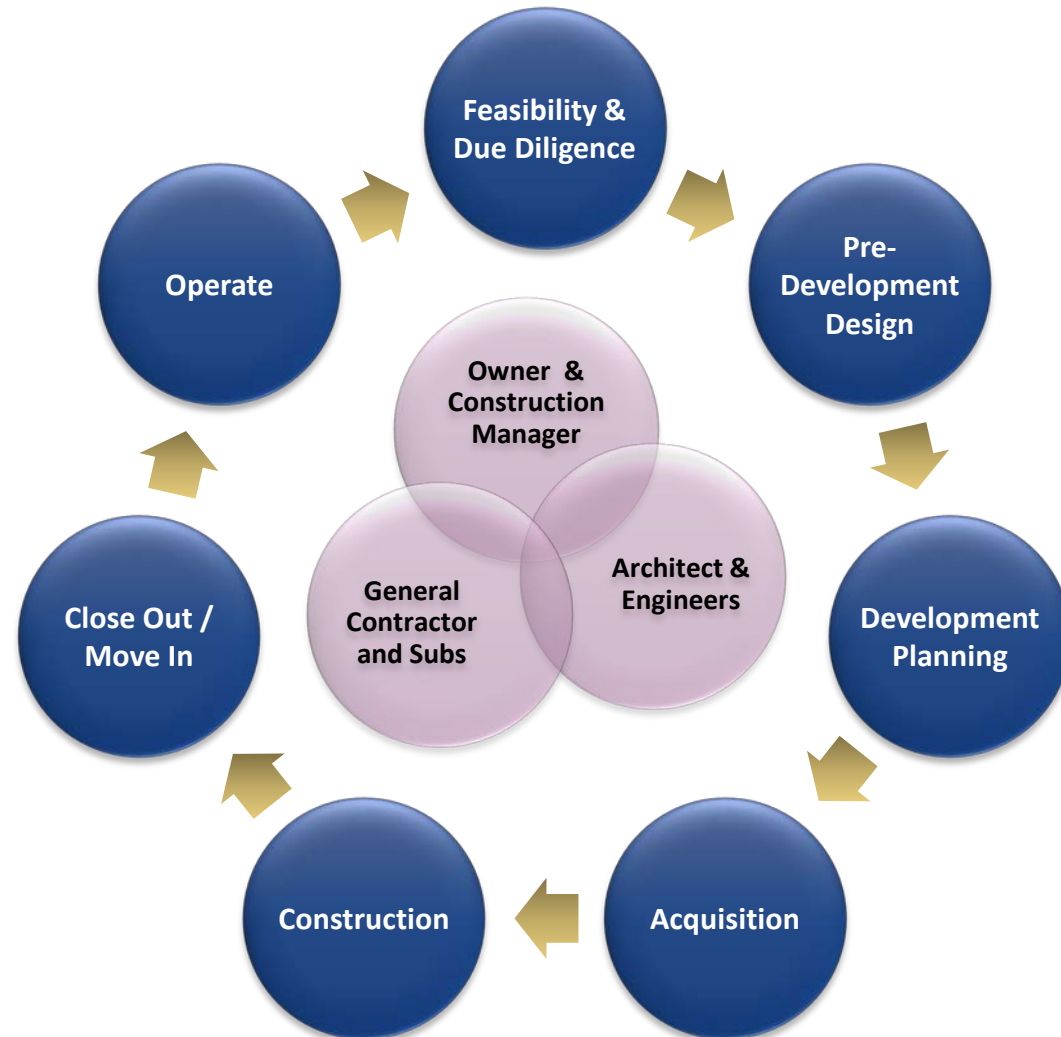
Round 5: Addressing Gaps #1
(October 2022)

Round 6: Addressing Gaps #2
(December 2022)

Real Estate Planning & Development

Brian Jones

Real Estate Development: The Big Picture!



What is the Real Estate Development Process?



What is Phase 1?

During *concept planning, feasibility, and due diligence*, you will identify the facility's big-picture needs, such as the goals that will be achieved by building the structure, where it will be built, and the people and businesses that will benefit from it when it is finished.



Concept Planning

What do you need to accomplish?

Define the needs and goals of the facility

- Conduct **feasibility study**
- Complete **site programming** with architect
- Begin **site selection process & due diligence**

Build relationships with your stakeholders

- Meet with local businesses, nonprofits, agencies, service partners, and clients

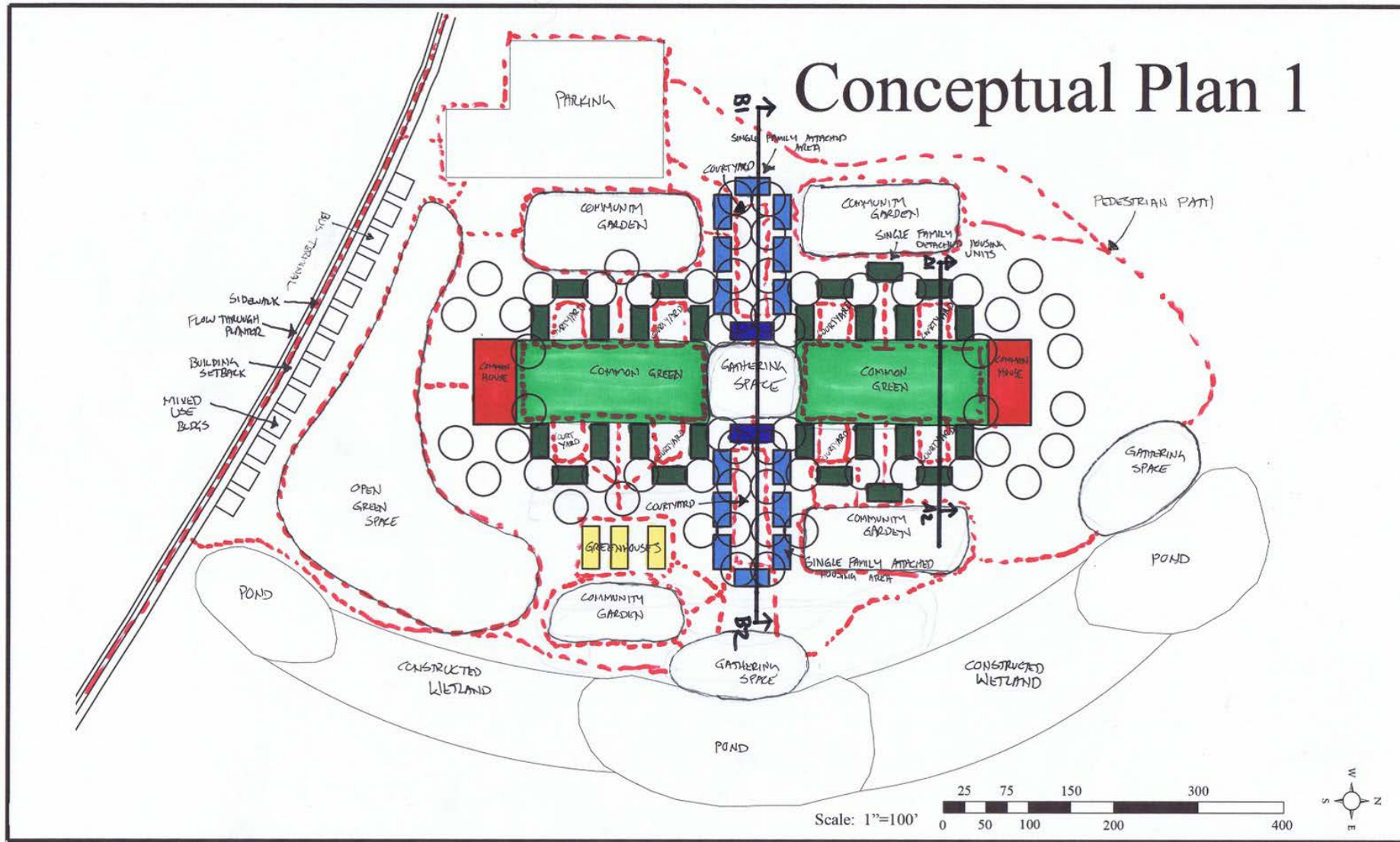
Define your scope, budget, and schedule

- Identify potential funding sources
- Create a **business plan**

Select key development team members

- Contract with
 - Real estate attorney
 - Construction manager
 - Architect
 - General Contractor





Sample Programming Plan / Concept Plan

Feasibility Study

Is this project practical?

The feasibility study is an assessment of numerous factors, including

- Economic
- Technical
- Demographic
- Legal
- Competition, and
- Organizational capacity

The goal of the study is to assess the strengths and weaknesses of a proposed project based on its

- Cost
- Value

Site Selection & Due Diligence

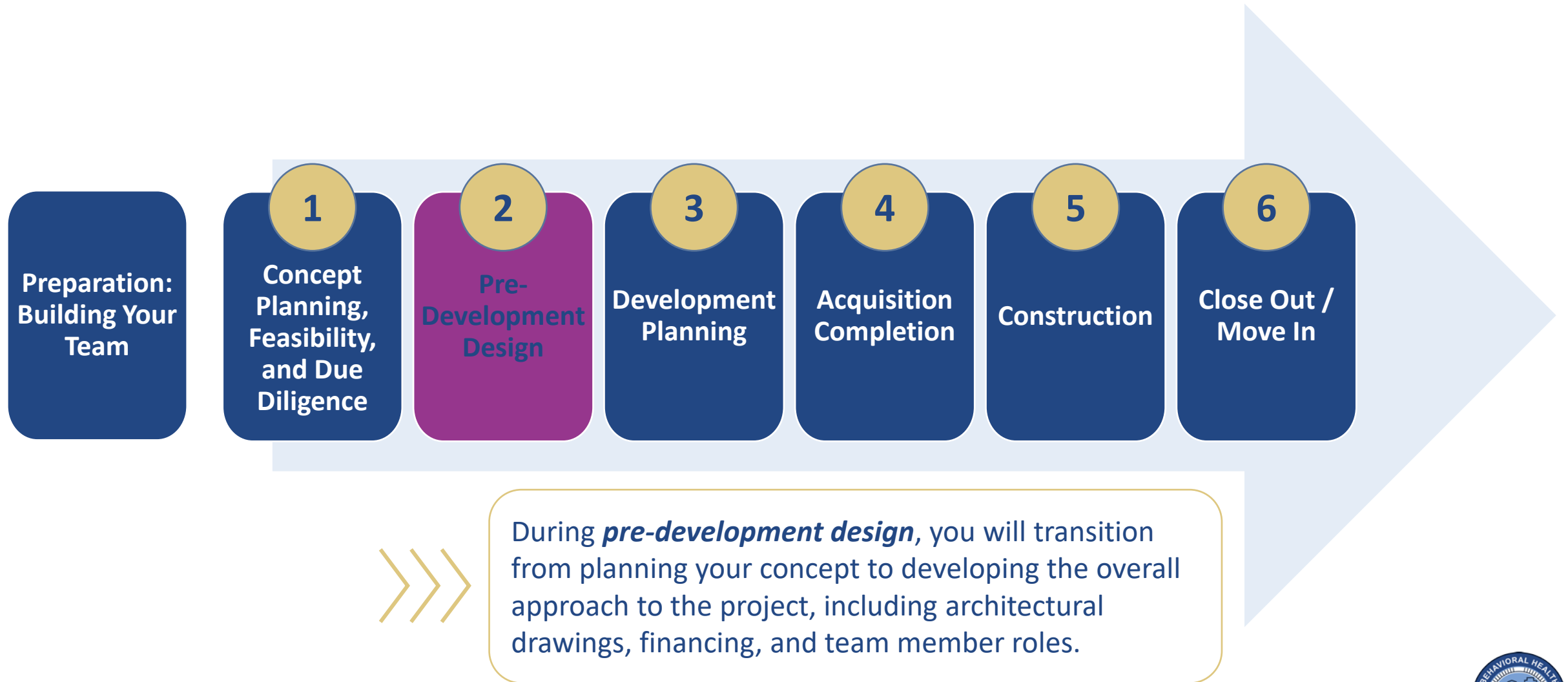
Does the selected property meet the project goals?

Are you purchasing a property?

Due diligence is the research conducted before engaging in an acquisition transaction to determine the associated risks. It is a process with several defined steps and outputs.



What is Pre-development Design?



Pre-development Design

After feasibility, before acquisition

What do you need to accomplish?

Work with architect on schematic design

- Complete **schematic design drawings**

Conduct financial planning activities

- Negotiate preliminary financing commitments
- Develop **budget**

Obtain initial project approvals

- Submit appropriate materials to local government for **preliminary review**

Kick off project with development team

- Work with your team to build interest and support for the project

Schematic Design

Schematic design, sometimes called concept design, is the first step of architectural design. In this phase, architects use rough sketches to produce more detailed drawings. These drawings show floor-by-floor and room-by-room dimensions, including common areas, hallways, entrances, and exits, and should include internal and external views. Additionally, the architect will begin to develop more detailed specifications about major components of the project. These include:

Type, quantity, and quality of materials

Systems such as electrical, plumbing, and heating, ventilation, and air condition (HVAC)

Stairways, roofs, foundation, walls, and doors

Landscaping, open space, parking, and traffic flow

Schematic Design: Key Elements



Civil engineering



Structural



Architectural interiors



MEP engineering



Landscape architecture



Development



Construction



Sample Budget

CONSTRUCTION COSTS - ESTIMATES and ACTUAL

Job Name: _____

No.	Item	Size or Qty	Estimate	Actual
1	Land			
	Property Taxes/FCHA dues			
2	Survey			
	Appraisal			
3	Attorney			
4	Plans			
5	Loan Origination Fee			
	Zoning Permit			
6	Septic Permit			
7	Building Permit			
	Contractors License Renewal			
	Workmen's Comp & General Liability			
8	Builders Risk Insurance			
10	Water/Well			
	Electricity & Gas			
11	Sewer (septic)			
12	Pipe under Driveway			
13	Clear Lot			
14	Gravel			
15	Excavate (crawl space/basement)			
16	Footings - Material			
17	Footings - Labor			
18	Foundation - Material			
19	Foundation - Labor			
20	Concrete Floors (basement/garage/porch)			
21	Steel			
22	Waterproofing			
23	Drainage System			
24	Termite Treatment			
25	Framing - Material (to complete dry-in)			



Preliminary Plan Review

How do local code requirements impact my design?

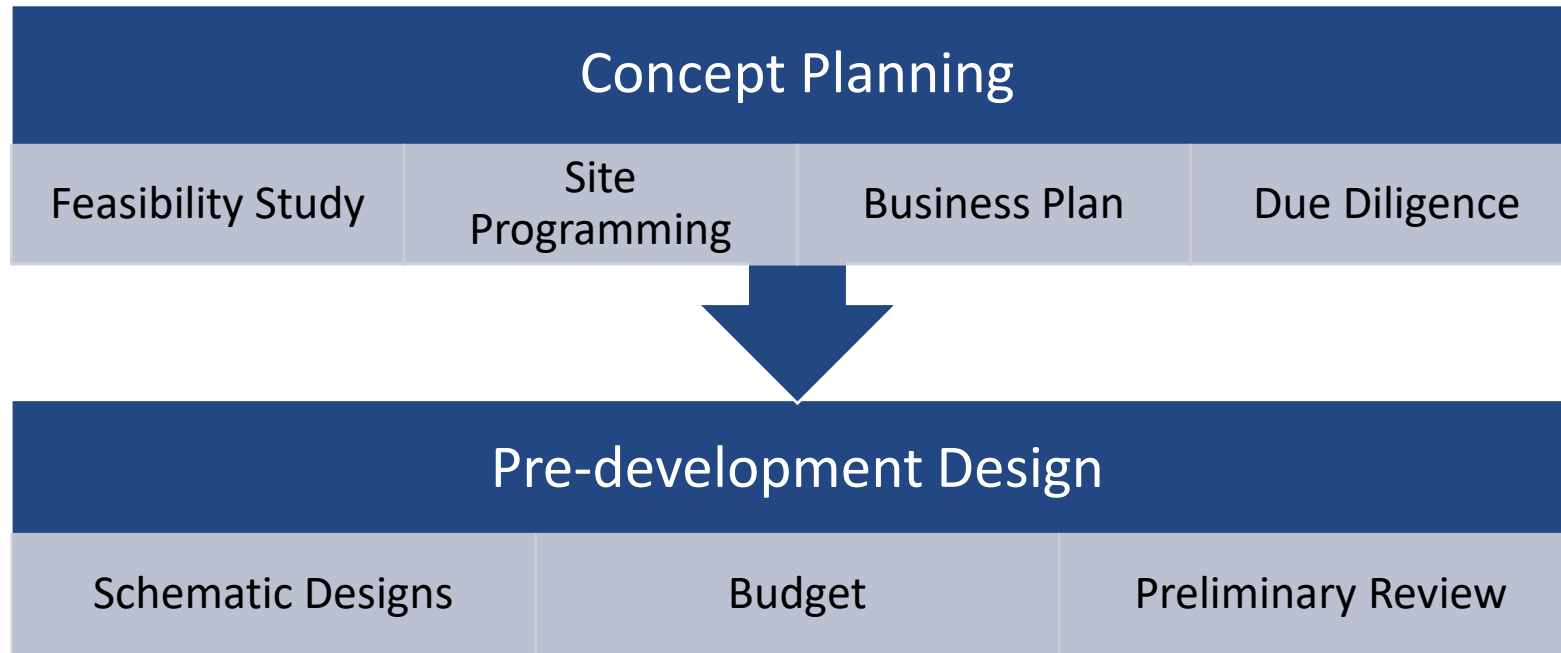
A preliminary plan review may be requested from a jurisdiction to identify potential code issues, obtain code interpretations, or to seek a variance.

Two steps

Schematics

Design

Summary of Planning & Pre-development Outputs



YOUR DEVELOPMENT TEAM

Who is on your Development Team?

- 1) Real Estate Attorney (Strategy, Contracting & Due Diligence)***
- 2) Health Care Architect (Schematic Design)***
- 3) Construction Manager (Owner's Representative)***
- 4) Civil Engineer (site inspections and due-diligence)***

The Statement Of Work (SOW) and Contracting Process

Maja Jolly

Statement of Work (SOW)

- The SOW template is the first step in the contracting process. Once approved, our legal team will review and may make suggestions for revisions.
- The final SOW language will be incorporated into the contract.
- The percentages in the amount's column are fixed disbursement amounts set by DHCS. Since this is a fixed price (deliverables-based) contract, each grantee bills/invoices us for the full % at the end of the designated time period in the SOW, regardless of what has been spent/not spent.
- If the grantee has fulfilled all the deliverables for the period, payment is made.
- Predevelopment activities may commence after approval of the action plan.

Statement of Work (SOW)

- Note: indirect costs are not allowable, and funding cannot be used to fund direct services or equipment to be used for service delivery.
- Instructions on the invoicing procedure will be sent after the contracts are finalized. We understand that this may take time as many will need BOS approval.
- Action Plans and Final Reports must be submitted no later than **12/16/22**.
- Planning Grant funding must be expended by **12/31/22**. Applicants may complete planning in a shorter timeframe.



SOW Template Instructions

Screenshare



Send **approved SOW** to
mjolly@ahpnet.com

by COB Friday, May 12

Please reach out with any questions.

Q&A



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Thank you!