

C.A.S.H. 30TH ANNUAL CONFERENCE ON SCHOOL FACILITIES

30 YEARS OF SCHOOL FACILITIES LEADERSHIP ADVOCACY ♦ EDUCATION ♦ COLLABORATION

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Workshop # 21

Who Is On Your Project Team and How Do You Pick the Right People

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**Who Is On Your Project Team
& How Do You Pick The Right
People?**

Joe Quinonez – Montebello Unified School District

Len Metcalf – Nadel Architects

Steven Worley – Tilden Coil Constructors

David Orbach – Orbach, Huff & Suarez, LLP

**Who Is On Your Project Team
& How Do You Pick The Right
People?**

The Architect's Perspective

Len Metcalf – Nadel Architects

Who Is On Your Project Team & How Do You Pick the Right People?

- District Determines Partners Needed
 - Project Manager/Construction Manager
 - Architect
 - Attorney
 - Inspector
- Will District Use In-House Services?

Architect's *Collaborative Role*

- Early Planning/Design
 - Historically, architect was responsible for all aspects of construction
 - Today's division of responsibilities requires close collaboration among all parties

Architect's *Collaborative Role*

- Additional Services
 - Architectural firms may offer additional management
 - State program, consulting reviews, estimating, & schedule support services
 - Important to have the Architect and CM working closely early in the process

District's *Key Objectives*

- Attracting the right team members
- Utilizing the team for success

Hiring of Professional Consultants

- Consultant selections must be made through a qualifications based process, not a “bid”
- Fair and open process
 - RFQ/P to qualified consultants
 - Describe the scope of work / project list
 - Define the selection criteria and timetable
 - Outline the submittal requirements / process
 - Indicate if sub-consultants are part of the team

Typical Proposal Information

- Letter of Intent
- Description of Firm / Relevant Experience
- Project Team / Approach
- Sub-Consultant Team / DVBE Process
- Hourly Rates / Fee Basis vs. Actual

Typical Selection Criteria

- Responsiveness to RFP/Q
- Team Experience & Qualifications
- Previous Client Satisfaction
- Availability & Production Capacity of Team
- Impression at Interview

Negotiation With Most Qualified Team

- Prepare in order to set tone for project relationship
- Issue Contract Form during RFP
- Provide flexibility in contract details
- Provide forum to hear consultant issues and concerns

How Do You Make It All Work?

Keys to Successful District / Architect Teaming

What The District Should Provide

- Clear Project Direction
- Adequate Time and Fees For the Project
- Timely Document Reviews and Decisions
- A Single Point of Contact
- Empowerment of Architect As a Team Leader

What the District Should Expect

- Sufficient and Appropriate Staffing
- Compliance With a Reasonable Schedule
- A Single Point of Contact, With Back Up
- Collaboration with District and Construction Management
- Experience With Agency Processing
- Follow Through on Commitments

Strategies to Ensure Success

- Allow For 3% to 7% On Average in Change Orders
- Avoid Unnecessary District CO's
- Don't Design Too Closely to the Budget
- Work As a Team, No Finger Pointing
- Stay Involved, Don't Have the Design Team Speak Exclusively For the District

Project Inspector

Contract Role / Obligations

- The District is Required to Provide Independent Inspection Services for DSA Projects
- Project Inspector Works Closely With the Architect
 - It is important to select an Inspector and an Architect who will work well together
- Select an Inspector Who Is Not Over-Committed

Project Inspector

General Requirements

- Provides Continuous Inspection
 - Inspection Budget Minimum of 3% of Construction
 - Testing Budget an Additional 1.5% to 2%
- Coordinates Special Inspection & Testing
- Monitors Contractor's Performance
- Overall Quality Control

Project Inspector

Relationship With the Team

- District Recruits & Holds Inspector Contract
 - Relies on Consultants to Monitor Performance
- Certified By, and Reports To, DSA
 - Without Contract
- Takes General Direction From Architect
 - Without Contract
- Architect Approves Inspector Selection (SSS5)
 - Can Request Removal

Project Inspector

Reporting Practices

- Provides Regular Reports
 - District and The State
 - Daily Reports
 - Semi-Monthly Reports
 - Verified Report; Final
 - Critical; Transfers Liability to State

Architect

What to Look For

- Trustworthy Behavior
- Good Attitude
- Good Reputation With Other Clients
- High Threshold For Pain
- One Who Knows & Embraces the Process, & Establishes Common Goals

Architect - Needs

Critical District Tasks

- Early Reports & Priorities (Hazmat, Seismic, Soils, Assessments...)
- Early Retention of CM or District Management
- District Standards
- Regularly Scheduled Strategy Meetings
- Partnership Involvement

Architect - Provides *Coordinated Project Phasing*

- Develop Phasing Options With CM/District
- Coordinate Design/Review/Construction
- Assist With Cost/Budget Control
- Pre-Plan Interim Facilities and Costs
- Manpower Projections
- Cash Flow Projections for District

Architect - Provides *Contract Management*

- Knows and Understands Roles of Team Members
 - CM/District Responsibilities
 - CM/Contractor Responsibilities
 - Inspector/District/Architect Responsibilities

Architect - Provides *Coordination of Project Meetings*

- Orchestrate Planning/Programming/Design
- Work Well With All Stakeholders
- Maintain & Report Progress to District

Architect - Provides *Coordination - Communication*

- Uniform Distribution of Information
- Coordinate With Key Sources
- Involve All Decision Makers

Architect - Provides *Sound Construction Documents*

- Consider Priorities, Scope, and Budget, Start to Finish
- Architect/CM to Review and Update
- Participate in 3rd Party Constructability Reviews
- Prepare For Cost/value Management

Architect - Provides *Coordination of Pre-Bid Conditions*

- Package Documents Per Bid Approach
- Review Contract Elements
- Confirm Scope Clarity
- Determine Efficient Alternates
- Confirm Approvals and Budgets
- Coordinate Forms and Procedures
 - Payment Applications, Communication Methods, Submittal Schedules, Substitution Limits

Architect - Provides *Coordination of Bid Procedures*

- RFI's, Clarifications, Interpretations
- Job Walks and Meetings
- Review Bids and Coverage

Architect - Provides *Construction Team Partnership*

- Early Response to Issues
- Manage Change Orders
- Collaborate With District/CM Team
- Documentation

Architect - Provides *Coordination of Project Completion*

- Coordinate Project Punch List Corrections
- Assist District With Close Out
 - Documentation From Construction Start
 - Reports/Tests
 - Warranties/Training
 - Substantial Completion Notice
 - Post Occupancy Follow-Up

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People?

Steven Worley – Tilden-Coil Constructors

Being A Construction Manager of Choice

From An Owner's Perspective

What Should An Owner Consider?

Values

- Competence
 - Do they have the right experience and the right people?
- Commitment
 - Do they deliver?
- Effectiveness
 - Is it effortless?
- Legacy
 - Do they leave it better than when they started?

What Is Value?

Principals, standards, or quality considered worthwhile or desirable

Competence

Ability To Effectively Perform

- Mindset
 - Solution oriented
- Manner
 - With experience and resources
- Benefit
 - Trust

Commitment

Being Bound To a Course Of Action

- Mindset
 - A pledge to what was promised
- Manner
 - Not accepting NO for an answer
 - Assisting all who are in need
- Benefit
 - Timelines are met

Effectiveness

Executing With Precision

- Mindset
 - Anticipating and planning
- Manner
 - Acting decisively
- Benefit
 - Expected results

Legacy

Making a Positive Impact

- Mindset
 - Leaving it better than it was received
- Manner
 - Respect
- Benefit
 - Relational / Community equity

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*David Orbach – Orbach, Huff & Suarez,
LLP*

A Legal Perspective on the Consultant Selection Process

- Every Consultant should be selected via the RFP/RFQ process
- Transparency (no orange jumpsuits)
- Provides opportunity to the Consultant Community (known and unknown)
- A competitive process may increase services and decrease fees
- True or False: Complying with the law is a good thing
 - Government code §§4525, 4526, 4529.5, 4529.10
 - Education Code §17070.50

The RFP Process – The First Date

- Every Consultant wants to tell you about their great projects –
- You want to know about their worst
 - What went wrong
 - How (or if) it was fixed
 - What the Consultant learned from the experience
 - What steps the Consultant recommends to avoid a repeat
- Ask the District what its view of the experience was – and how did the Consultant perform

How To Select An Attorney

- Expertise
- Firm Depth
- Responsiveness
- Problem Solving
- Bills and Billing
- References, References, References