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C.A.S.H. WORKSHOP
Plan Verification Team (PVT)

Friday, December 11, 2009

9:00 a.m. to 12:30 p.m.

Ontario Airport Marriott
2200 East Holt Boulevard
Ontario, California

**HOW MY DISTRICT MAXIMIZED THE PVT REVIEW TO
OPTIMIZE PROJECT FUNDING:**

The Project Team and the Dialogue with the OPSC PVT

ANNA ULIBARRI

Rialto Unified School District

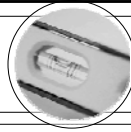
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Handout materials are available online after the workshop. To download the materials, visit www.cashnet.org/meetings and click on the link labeled "Workshop and Conference Handouts."



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HELP!

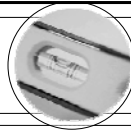
What Do I Need to Know to Maximize the PVT Review and to Optimize Project Funding?

Anna Ulibarri

Director, Facilities Planning
Rialto Unified School District



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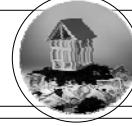
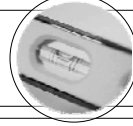
THE PEOPLE – Project Team

Building the Project Team – and their
importance in the PVT Process

- *Start with the right people – externally –
hire people – not the firm*



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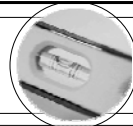


THE ARCHITECT – Works in conjunction with District and All Consultants

1. Grant Eligibility (project budget estimate) 50-04
2. State Agency Forms – CDE/OPSC Forms and submittals
3. Approved construction plans and specifications by DSA and CDE (design and documentation)
4. Cost estimates – verification of grant amounts for; Site development, off-site development and utilities in accordance with CCR Section 1859.76
5. Dimension of all proposed buildings, including interior dimensions
6. Labeling of facilities
7. Accessibility details for elevators, lifts and access ramps
8. Special Day Classroom (Severe and Non-Severe) facilities should be labeled as such if included



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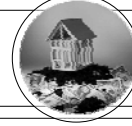
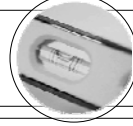


STRUCTURAL ENGINEER

1. Drawing details for retaining walls or ramp structures designed to mitigate a grade change greater than six feet with a grade of two to one or greater



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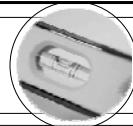


CIVIL ENGINEER – Existing Conditions and Demolition Plans

1. Proposed changes in existing site contour
2. Layouts of the proposed installation of utilities
3. Complete storm drainage system, both on-site and off-site
4. Required cut and fill and engineering fill for buildings pads, supported by the soils report
5. Complete off-site plans for work required by local entities – by separate City/County approved plan sets, including landscaping and street lighting, traffic signs, stop lights, retention detention ponds, fire hydrants



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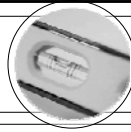


UTILITIES/PLUMBING ENGINEER

1. Provide plans for the installation of main supply line from the utility (water, sewer, and gas) point of connection (POC) for the existing utility service to the meter
2. POC to the first building lateral, if there is not meter
3. Any sewage treatment disposal system
4. Fire suppression water storage and pumping system, or domestic water storages and pumping systems when required



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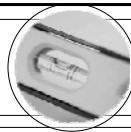


UTILITIES/ELECTRICAL ENGINEER

1. Provides plans for the installation of electrical service and/or communication service from the utility or company POC to the nearest distribution center



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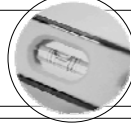
CONSTRUCTION MANAGER

*Reviews Design (Constructability) – Pre-
Construction Extimates*

*Provides Support Documentation and Value
Engineering Recommendations*



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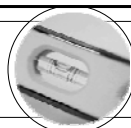


Service Site Development (Within School Property Lines)

- Site Clearance
- Demolition
- Re-routing of Utility lines
- Rough Grading
- Soils compactions
- Storm Drain - WQMP
- Erosion Control – SWPPP - AQMD
- Stairs ramps retaining walls
- Fire Code requirements
- Multi-level parking
- Removal and relocation of classrooms



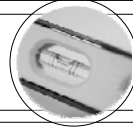
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Off-Site Development

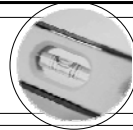
(two contiguous adjacent sides of the site from the property line to the street centerline as required by local ordinances/authorities)

- Curbs, gutters and paving
- Sidewalks
- Street lighting, landscaping & Signage
- Special District and Utility Connection Fees
- Storm Drain Cost
- Safety Paths (NTE \$50,000) SR2S



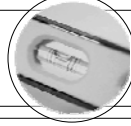
Utility

- Water
- Sewer
- Gas
- Electrical
- Communications
- Special Fees



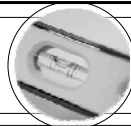
The District

- *Team Leader with strong district management –*
you set the expectations and the scope of work
– you are in charge



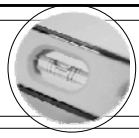
The District

- District leadership - is essential in defining clear roles and responsibilities for all members of the team – WHO DOES WHAT?
- District works with Architect to establish project budget and to control costs through active management of scope and design.
- District works with Construction Management to manage budget and control costs through the constructability review comments (their implementation) – cost estimates – value engineering recommendations -coordination- schedule and quality control of project.



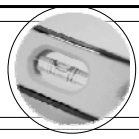
The District

- Communication is essential!
- In-house team - *Start with the right people* – internally – they do not need to have the knowledge of the experts, but must know the approval process and how it applies to the project.
- Learn from those who've been through the process.
- Demonstrate your knowledge of the program by knowing the project scope, schedule and the budget.
- Look for the gaps and fill them with the expertise of your team.



The Plan – Who Does What?

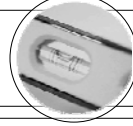
- Now that the expectations have been determined and design outcome is to your approval – set your tasks in motion.
- Establish a timeline and matrix of what is needed from the inception of the project to closeout. To ensure a successful move from conception to completion identify all relevant requirements.
- The matrix should include – Topic/Task – Code/Regulation – Technical Study – responsible Consultant – Deadline
- Review often - to ensure you are on task and to fill any gaps that may occur. This is essential for the **PVT** Process. Support documents takes time to gather – **START EARLY**



The Process – Who Are We Doing It With?

Identify the Agencies:

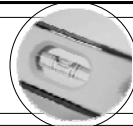
- State Agencies
 - OPSC, SAB, CDE, DSA, DTSC, DIR, SWPPP
- Regional & Local Agencies
- Planning Commission
- Fire Marshal
- Environmental Health –
- Transportation/Traffic Safety
- Storm Water Flood Control
- Regional Air Quality Management District



The Process – Who Are We Doing It With?

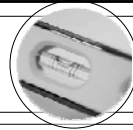
Utility Agencies:

- Water & Sewer
- Power
- Natural Gas
- Telephone
- CATV
- Landscaping & Lighting Maintenance



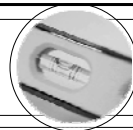
The Process

- COMMUNICATE EARLY WITH THE AGENCIES – IN PERSON - TO ESTABLISH RELATIONSHIPS (especially with the **PVT** Team). TAKE YOUR CONSULTANTS WITH YOU TO OPSC.
- Build effective relationships – know the agency players – understand their approval process
- Read the rules of the Game
- Provide accurate data with supporting documents - they will guide you to the hidden eligible costs
- Be ready to negotiate – legitimize your request – know when to stop and seal the deal



The Project – What Are You Building and Where?

- The **PVT** Process starts with site selection – know the risks and examine the costs – CEQA mitigations, conditions in reports (geotechnical, traffic, safety, etc.)
- A word of caution – purchasing more land than CDE recommends for the master plan capacity of the site will result in the pro-ration of the service site, off-site and general site development grants by the **PVT** Team for the amount of the excess site acreage.

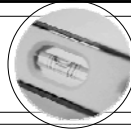


KNOW YOUR PROJECT

- Multi-jurisdictional situations – City/County
- Other hazards
- Level of existing infrastructure
- Roads – Cal Trans
- Safe Routes to School (safety paths)
- Wind conditions
- Regional Water Board requirements
- Traffic Control
- Special District Fees – (i.e. – circulation fees)



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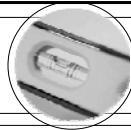


THE CHALLENGES: The Whole Truth about Our Projects

- What do I do – the City, County or other agency is asking me to do more than what OPSC will fund? Will not approve off-site plans
- What do I do - I don't have completed utility plans
- Do not be afraid to negotiate with the agencies – there is always a solution to the challenge
- Call your elected officials if necessary.



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Thank You!