

Monday & Tuesday Workshop Schedule

Key

(FM)	Fiscal Management
(HP)	High Performance
(M&O)	Maintenance & Operations
(P&PM)	Planning & Program Management
(SA)	School Architecture
(STA)	State Agency

Monday, February 22, 2010

4:30 p.m. – 6:00 p.m.

How to Build a School in 90 Minutes! (SC)

Cathy Allen, Western Placer USD

This workshop will take you step-by-step through the process of building a school starting from establishing eligibility and finishing with DSA Close-Out. Come and learn from our expert panelists tricks of the trade and important steps to not miss during your school construction project.

Tuesday, February 23, 2010

8:30 a.m. – 11:30 a.m.

School Construction 101/201 (SC)

Mark Kelley, Miller Brown & Dannis & Philip Henderson, Orbach Huff & Suarez LLP

C.A.S.H.'s traditional School Construction 101/201 workshop will continue to evolve this year. Engaging video features, greater consistency, and audience participation will provide systematic training in the basics of construction in School Construction 101, with more advanced topics in School Construction 201 feeding into the panels and round tables in the rest of the school construction strand. Audience participation will be encouraged during the workshop and all questions are welcome.

8:30 a.m. – 10:00 a.m.

The State Agencies' Top Tips for Getting Your Project Approved – An Overview of the State Agencies (STA)

John Gordon, CDE/School Facilities Division

The CDE/School Facilities Planning Division, Division of the State Architect, and Office of Public School Construction are joining forces to present a workshop that will focus on providing participants with helpful tips and pointers to assist them and their districts with devising a winning strategy for a smoother, more successful project approval process.

Persistence Pays Off: Lessons Learned from Green Post Occupancy Studies (HP)

Rob Samish, Lionakis; CHPS Board Member

A growing body of evidence suggests the full energy and health benefits of green high performance schools are tied to the level that design features and practices persist beyond construction. What are recent post-occupancy studies of green buildings telling us about “persistence”? Both CHPS and LEED rating systems emphasize an integration of design and M&O, an integration of modernizations with school master plans, integration of constructed systems with maintenance training plans, energy reporting and an integration of buildings that teach with educational planning. How should we incorporate sustainable design principles and product selection with proven district standards into modernization and new construction projects? Real “high performance” means all of these – health, energy, effective operations and learning that persists!

Integrated Project Delivery: Lean Times Call For Lean Methods (P&PM)

Leigh Coop, Vacaville USD

Integrated Project Delivery, widely used in private sector institutional projects such as hospitals, is a process that engages the talents of both the design and the construc-

tion team at the outset of the project. It uses methodology that has emerged from the Lean Construction movement that is revolutionizing construction worldwide by adopting methods based on Toyota's unique approach to automobile manufacturing. Starting in the 1950s, Toyota began a slow revolution in the auto industry with Lean Production Management, a novel approach to getting the right things to the right place at the right time in the right quantity, all with the intent of minimizing waste and maximizing operational flexibility. Practitioners in the construction industry eventually adapted this set of practices for their own purposes and dubbed it Lean Construction, later expanded to Lean Project Management. Integrated Project Delivery is available to public sector projects through alternative procurement methods such as Lease-Leaseback and Design-Build.

Vacaville Unified School District decided to adopt Integrated Project Delivery/Lean Project Management in the planning and execution of fourteen projects for the District. To date, thirteen of these projects have been successfully completed with no claims, disputes, or cost overruns in the face of significant challenges. As a result, the District is rapidly expanding and embracing Integrated Project Delivery throughout its building program, and Capital Program Management is adopting this delivery method throughout its program/project management practice.

10:30 a.m. – 11:30 a.m.

Delinquent Tax Collection and Foreclosure (FM)

Wendy Wiles, Bowie Arneson Wiles & Giannone

This workshop will offer discussion of actions needed to be taken by school districts to collect delinquent special taxes on behalf of its Community Facilities Districts in order to meet bond covenant and other debt obligations; addressing public concerns with potential “foreclosure” of homes and processes to secure payment of delinquent special taxes. In addition, the

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panel will discuss how delinquency rates impact General Obligation Bonds, Certificates of Participation and Community Facilities District Bond Sales.

2:15 p.m. – 3:15 p.m.

Project Certification (STA)

Craig Rush, Division of the State Architect
Update on DSA Project certification.

Includes presentation of the newly updated project certification guide, How lack of certification effects new proposed projects (IR A-20), New close out procedures (PL09-04) and a look ahead at certification streamline proposals and possibilities being considered.

Bid Protests in a Time of Hungry Contractors: How Should I Handle All of the Protests? (SC)

Julie Arthur, Palm Springs USD

We will all be seeing more bid protests until the economy improves. Learn the areas of your bid package that are most likely to lead to bid irregularities and how to avoid them. We will also discuss typical bid protest issues and “tricks of the trade” used by bidders to submit bids that avoid certain requirements, yet are legally responsive. Learn how to develop specifications that minimize the likelihood of large, questionable bid spreads and how to implement effective bid protest procedure requirements that you should include in your bid package. As an added bonus: develop your skills at managing governing board meeting craziness.

Why “Visioning” Should be Part of Your District’s Comprehensive Master Plan (P&PM)

Tim Haley, Stafford King Wiese Architects

A key element of a comprehensive Master Planning process is “visioning.” You will learn why visioning sessions involving collaboration between facilities staff, curriculum planners, academics, and other stakeholders can positively impact the Master Planning process. This process provides a means by which a common language can be defined and understood – what you want to teach, and how you want to teach it. Ultimately, the designs will

result in defining the educational suitability of facilities, which will provide a far better environment for learning.

Additionally, the use of Education-Technology facilitation tools and processes will help create a bridge between the Curriculum and Information Technology departments. This spirit of cooperation and communication will allow special programs such as Career Technical Education (CTE) to successfully integrate into a district’s Master Plan.

This workshop will use the recently completed Fresno Unified School District’s Master Plan as a case study utilizing a visioning process. Today’s students learn differently, and tomorrow’s students will be even more technology oriented and capable – so, we will also show a video on how technology is affecting the next generation of learners in the United Kingdom.

P3 – Public/Private Partnerships – Will Your District Get Inspired Into Action? (SA)

Rick Parks, DLR Group

With state agencies too strapped to fund construction for schools and school districts looking for alternative and supplemental funding sources, the P3 idea is spreading. Learn how to identify teaming partners, to collaborate, and to coordinate programs with public/private entities for successful facility projects. Owned and operated by the City of West Sacramento and located on the campus of Washington Unified School District’s new River City High School, the 56,800 sf West Sacramento Recreation Center is a fee-based facility built under the P3 model: a school district partnering with its local government for the benefit of students, teachers, administrators, the City of West Sacramento, and the community-at-large.

Legislative Update

Margaret Brown, Los Angeles USD

In addition to the typical presentation of perennial bills introduced by the Legislature, this year’s Legislative Update will focus primarily on the tumultuous funding

conditions for school facilities in California and what it has meant for the School Facility Program and its future. In 2009, school districts statewide experienced what was essentially program collapse – where state moneys froze, district assets and financial capacities were eclipsed by state, national and global conditions yet local needs persisted. In short, the SFP broke. The State apparently is seeking to break the partnership forged through SB 50 in 1998. Conflicts continue to emerge over the School Facility Program. The Legislative Update will be a leader for future, more in-depth discussions about the program collapse, its causes and ideas on how to repair the SB 50 relationship.

2:15 p.m. – 4:30 p.m.

M&O – Professional Best Practices and Hot Topics (M&O)

Joe Dixon, Santa Ana USD

Coping with fiscal crisis involves much more than number crunching and analysis of the financial statements. Critical review of the programmatic process is of paramount importance in the maintenance of facilities. Learn about these best practices and how to improve your district through operational excellence.

- Planned Maintenance
- Efficiency Standards
- Maintenance Issues

3:30 p.m. – 4:30 p.m.

What to Do? Prequalify or Train Those Hungry Contractors (SC)

Karl Bradley, Sweetwater Un. HSD

Contractor prequalification can streamline the bidding process and provide districts with added assurance that the lowest bidder will also be a responsible bidder. When done correctly, prequalification is a great tool. But is prequalification the best option in this very hungry bid market? Some school districts are offering training to contractors that have less school district experience. Is that a viable option? This workshop will provide a “how to do” both options correctly with an emphasis on real-life lessons learned.

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How to Reduce Energy Costs and Enhance Educational Quality (HP)

Debbie Murray, Grossmont Un. HSD

The workshop will cover implementing a structure that provides ongoing energy efficiency benefits, incentives that are available for energy conservation measures, and case studies demonstrating the cost savings benefits of energy efficiency. The panel will include an energy engineer, a utility representative, and the assistant superintendent for facilities services and director of plant operations from an innovative district.

An introduction to Energy Master Planning will be provided which includes descriptions of energy reduction targets, energy auditing of existing schools and energy efficiency guidelines for new construction and maintenance and operations. Also, highlighted will be an overview of utility rebate and incentive programs as well as the Grid Neutral Schools program initiated by DSA and the strategies that are effective at meeting its goals. Finally, district case studies will show how cost savings can be achieved through energy efficiency and sustainability efforts, how capital dollars can be used to save operational dollars, and the benefits of retro-commissioning and optimizing scheduling of systems using energy management systems. Ultimately, these cost savings can be used to achieve the districts number one goal of providing quality education.

Behind the Scenes – Putting the Pieces of Performing and Visual Arts Together to Inspire Student Collaboration and Workplace Success (SA)

Brian Whitmore, Williams + Paddon Architects + Planners Inc.

Many forward-thinking public school districts are demonstrating a renewed interest in Performing Arts Facilities. Could it be because they find the positive effects on education go beyond teaching students how to act, sing, and dance? Preparing today's students for tomorrow's careers means nurturing less-tangible (and

less-testable) talents: teamwork, collaboration, responsibility, presentation skills and technical know-how. Many of the elements critical to producing a performance, whether out in front or behind the scenes, use the same skills employers now identify as having high value in the workplace. Learn how facilities showcasing the Performing Arts are supporting the curriculum needs of next-generation leaders. You'll also learn how to find additional funding and how to garner community support – as well as positive PR – for these exciting facilities.

In Today's Economy, Learn What It Takes to Effectively Plan and Pass a Bond (P&PM)

Dennis Dunston, Total School Solutions

Ongoing state budget reductions and decreased developer fee collections are causing many school districts to cope with limited planning staff, and the inability to further the execution of projects. Couple that with California's economic uncertainty of not being in a position to place a state-wide bond measure on the ballot in November. It really leaves school districts with two options: Either place a local bond on the ballot and go it alone with no state funding partner; or indefinitely postpone its capital outlay construction program.

How do you plan in these uncertain economic times? How do you overcome anti-tax contingents that are mobilizing and local voter sentiments that are more vocal than usual? Learn campaign strategies to counter the nay-sayers. Please join us for this workshop and discover how a well-messaged public relations campaign can put your bond into the win column!

Going Green – Finding the Right Path (FM)

Warren Diven, Best Best & Krieger LLP

Going solar is all the rage, but can your district afford it? What financing alternatives are available to choose from and which is the right financing alternative for your district? Is it a distributed power-

purchase agreement (PPA) or a public financing option such as Clean Renewable Energy Bonds (CREBs) or traditional tax-exempt bonds? How do these financing alternatives compare and how can you make the right financing decision for your district?

Tuesday Roundtable Discussions

Key

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8:30 a.m. – 10:00 a.m. **Maintaining Control of Your Own Projects: Managing Consultants to Avoid Surprises (FM)**

Cheri Love, PubliConstructionLaw

Tips on establishing and preserving clear spheres of responsibility and chains of command, ensuring that consultants remain accountable to you, keeping yourself fully informed and delegating effectively.

Understanding the Terms in the “Green Revolution” (HP)

Karim Allana, Allana Buick & Bers Inc.

Potential benefits and pitfalls of energy services contracts, exemption from public bidding, and common pitfalls.

For Sale or Lease, School Property, Available Immediately! (P&PM)

Jerome Behrens, Lozano Smith

Procedures for disposal of surplus property, strategies for working with a “7-11” Committee, compliance with CEQA, and obligations relative to a charter school’s demand to use a facility will be presented. This session also covers key considerations prior to taking formal action to approve school closure.

You Want to Do What? Awarding Construction Contracts to Other Than the Low Bidder (SC)

Kimble Cook, Orbach Huff & Suarez LLP

The tricky process of competitive bidding; including what is considered non-responsive and non-responsible.

Purchasing: Contracts – Adequately Protecting Your District in the New Economy (M&O)

Tyree Dorward, Best Best & Krieger LLP

Tips and strategies for all manner of purchases made by school districts, including discussion of current trends, legal requirements, and potential pit-falls.

Emergency Repair Program (ERP) – Audit Process (STA)

Ngozi Pruett, Office of Public School Construction

2:15 p.m. – 3:45 p.m. **Fire Sprinkler Submittals, No Longer a DSA Deferred Item (STA)**

Dave Casey, Division of the State Architect

Special Education Facilities (STA)

Liese Olukoya, CDE/School Facilities Planning Division

Facility implications of federal and state laws and regulations regarding providing the Least Restrictive Environment for special education students.

Facility and Financial Management Compliance and Accountability (FM)

Patricia Paulsen, Calif. Financial Services

Options and solutions on how to track facility funding sources, project accounting, meet audit requirements, and provide reports to bond oversight committees and school boards.

Storm Water General Construction Permit (M&O)

Steve Herrera, Owen Psmos

The State Water Resources Board has approved its General Construction Permit (GCP) which is scheduled to go into effect on July 1, 2010. This roundtable will provide an overview of the GCP, and discussion of the implications of the GCP on construction projects.

School Site Acquisition: Buying Cheap and Fast (P&PM)

Jerry Suich, Oxbridge Development Inc.

Site acquisition in California is heavily regulated. This roundtable is designed to give quick tips on making the average school site purchase go more quickly and cost effectively.

Keeping Your Consultants and Contractors in Line and How to Tell When They Are in Financial Distress (SC)

Terry Tao, Atkinson Andelson Loya Ruud & Romo

Tips for identifying, working with, and also discontinuing services when contractors, architects, and engineers have been hit with the current economic downturn and can’t finance or carry projects.