

2010 C.A.S.H. Annual Conference

Roundtable Proposals

As of: June 5, 2009

Title: Guaranteeing Your Schools' Energy Performance Goals

Description: This roundtable will discuss how districts can ensure that the energy performance goals of their schools are met, including but not limited to, LEED certification criteria and projected energy cost savings, and can be enforced as against contractors and consultants.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Sophie Akins
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101-8590
Phone: (619) 525-1332 Email: sophie.akins@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Protecting Your District in Contracting for Energy Services

Description: This roundtable will discuss common legal issues in contracting for energy services, including energy audits, and will provide practical advice on how to mitigate risk and minimize legal exposure in contracting for energy services under the Government Code.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Sophie Akins
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101-8590
Phone: (619) 525-1332 Email: sophie.akins@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: What's Next for Labor Compliance Programs

Description: This roundtable will discuss the new regulations and laws applicable to labor compliance programs and how districts may comply with these new requirements.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Sophie Akins
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101-8590
Phone: (619) 525-1332 Email: sophie.akins@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: PROPER SELECTION OF ROOF TYPES

Description: There are literally hundreds of roof types, making selection, design and budgeting very difficult. In this session, twelve types of roofs in use in California Schools will be discussed, including the typical benefits and construction defects experienced in each. The presenter of this workshop will provide photos of case studies and the pros and cons of various roof types. All attendees will be presented with a “How To” manual as well as an easy to use Excel worksheet to aid in the selection of roofing components and systems.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Karim Allana
Allana Buick & Bers Inc.
990 Commercial Street
Palo Alto, CA 94303-4907
Phone: (650) 543-5600 Email: karim@allana-lippert.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Understanding the Terms in the “Green Revolution”

Description: Description: School districts are interested in design for sustainability, LEED and especially when it comes to roof replacement: Garden Roofs. The issues that face the school district and the designer are payback analyses, life cycle costing, energy reduction and being a good environmental steward, and most importantly, what are the differences between terms such as “Green”, “Sustainable”, “LEED” and “Garden Roofs”. This workshop will present case studies of LEED points, Sustainable Design in Schools, and green and garden roof installation including a review of the various systems available and their applicability to K-12 schools. All attendees will be presented with a “How To” manual, worksheets and other design tools that they can use in the LEED points, sustainability, assembly and component selection, design and installation process.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Karim Allana
Allana Buick & Bers Inc.
990 Commercial Street
Palo Alto, CA 94303-4907
Phone: (650) 543-5600 Email: karim@allana-lippert.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: For Sale or lease, School Property, Available Immediately!

Description: 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.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length: 1 hour

Interested In Moderating: Yes

Submitted by: Jerome Behrens
Lozano Smith
7404 N. Spalding Avenue
Fresno, CA 93720-3370
Phone: (559) 431-5600 Email: jbehrens@lozanosmith.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: THE GAMES CONTRACTORS PLAY - BE PREPARED!

Description: If it seems that many contractors all go to the same legal seminars explaining how to extract money from you - guess what? - They are. This roundtable will discuss how to be prepared for contractor's tactics, so you will prevail.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Gregory Bergman
Bergman & Dacey Inc.
10880 Wilshire Blvd. #900
Los Angeles, CA 90024-4110
Phone: (310) 470-6110 Email: gbergman@bergmandacey.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Its 8:00 on the First Day of School: Do you Know Where Your Technology Is?

Description: Technology departments in school districts are typically understaffed and unprepared for the avalanche of work needed to implement a building or bond program. Time is of the essence, and opportunities missed can equal construction delays and cost overruns when it comes to your data, fiber, voice, intercom, clocks, bells, audio, video, intrusion, camera and televisions. Technology and facilities departments need to collaborate early on with the design team to identify the types of systems - from old school to IP-based solutions - and develop appropriate budgets, determine procurement options and establish delivery methods. This presentation outlines the benefits and challenges to integrating the

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length: 1.5 hours

Interested In Moderating: Yes

Submitted by: Margaret Brown
San Ramon Valley USD
699 Old Orchard Drive
Danville, CA 94526-1058
Phone: (925) 552-2960 Email: mebrown@srvusd.k12.ca.us

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Stormwater Management: Issues & Practices for California Schools

Description: A lively discussion of the latest techniques for addressing stormwater run-off issues on small urban school sites. Addressing new construction and modernization, bio-swales, flow-through planters and in ground planters. Roundtable moderator: David Carpenter, Senior Project Manager for Architecture, LEED AP, Sally Swanson Architects, Inc.; and Dr. HanBin Liang, P.E. , Principal, WRECO Civil Engineers.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: David Carpenter
Sally Swanson Architects Inc.
715 Tupper Street
Santa Rosa, CA 95404
Phone: (707) 688-3342 Email: dcarpenter@swanarch.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Common Inquiries Regarding Proper Assessment of School Facilities Fees

Description: This interactive workshop will focus on assessment and collection of school fees, as well as avoiding and resolving fee protests.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length: 1 hour

Interested In Moderating: Yes

Submitted by: Andreas Chialtas
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: AChialtas@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Current Trends with Projects Utilizing the Lease-Leaseback Construction Delivery Method

Description: The workshop provides an overview of Education Code section 17406 "Lease-Leaseback" design build projects, including a discussion of common practices. case studies. trends. and a look at the future of this delivery method.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length: 1 hour

Interested In Moderating: Yes

Submitted by: Andreas Chialtas
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: AChialtas@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Practical Questions and Answers on Best Utilization of Surplus School District Property

Description: An overview of practical questions to consider before using or disposing of school district property. Topics will include addressing the expectations of the Board, staff and community; maximizing revenue; determining and communicating district goals and selecting the best method of using or disposing of a site.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length: any

Interested In Moderating: Yes

Submitted by: Andreas Chialtas
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: AChialtas@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Avoiding and Resolving Labor Issues on Public Works Projects: With and Beyond Dual Gates.

Description: This session will address challenging labor issues that can arise on District construction projects, including union rights to access job sites, freedom of speech versus project safety, picketing on or near job sites; what to do when dual gates do not work, the contractor's role, and PLA implementation.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Marilyn Cleveland
Miller Brown & Dannis
71 Stevenson Street 19th Floor
San Francisco, CA 94105-2934
Phone: (415) 543-4111 Email: mcleveland@mbdlaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: You Want to Do What? Awarding Construction Contracts to Other Than the Low Bidder

Description: Competitive bidding can be a tricky process. If your bid asks for a certain level of experience and the bidder doesn't have that experience, is the bid non-responsive? Is the bidder non-responsible? This roundtable will address these and other exciting, but all too common questions and issues that arise in the competitive bidding process.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Kimble Cook
Orbach Huff & Suarez LLP
2121 No. California Blvd. Suite 290

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: How to Spend Less on Energy and More on Education

Description: Taking into consideration the historically tight budgets currently burdening school districts, this roundtable will create an open dialogue on how to cut utility costs. The moderator will provide industry insight into both low cost and high-end strategies for schools to leverage funding by capitalizing on energy savings opportunities. Savings potential through improved operations and education of facilities operators will be highlighted. Additionally, funding opportunities for energy efficiency projects will be identified, and approaches to maximizing associated benefits, presented through best practices. Participants will have the opportunity to share and discuss available energy-related resources. Technical assistance, and tried-and-true approaches to cut spending on energy.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Maya Craig
Northwest Energy Efficiency Council
185 Redwood Drive Suite 188
San Rafael, CA 94903
Phone: (415) 507-1432 Email: maya@seiinc.org

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: And Yet Another Hurdle: Conflicts of Interest

Description: Provide an overview of Conflicts of Interest, including a review of the Political Reform Act (FPPC Regulations), Government Code section 1090, Incompatible Offices Doctrine and Common Law Conflicts of Interest constraints.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Paula de Sousa
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101
Phone: (619) 525-1328 Email: paula.desousa@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Contracting for Maintenance: Competitive Bidding, Prevailing Wages and Other Requirements

Description: Provide an overview of the requirements for contracting for maintenance services such as competitive bidding requirements and prevailing wages.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Paula de Sousa
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101
Phone: (619) 525-1328 Email: paula.desousa@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Prevailing Wages 101

Description: Provide an overview of the California Labor Code provisions regarding prevailing wages, including new DIR Labor Compliance Program requirements.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length: 1 hour

Interested In Moderating: Yes

Submitted by: Paula de Sousa
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101
Phone: (619) 525-1328 Email: paula.desousa@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Project Closeout: Avoiding the Pitfalls

Description: An overview of requirements related to project closeout including retention release, stop notices, and handling disputed work issues.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Paula de Sousa
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101
Phone: (619) 525-1328 Email: paula.desousa@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: The ABCs of Procuring Professional Services

Description: Provide an overview of the procedures for hiring consultants, such as design professionals, environmental consultants, inspectors and construction management consultants.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Paula de Sousa
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101
Phone: (619) 525-1328 Email: paula.desousa@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: CDE Approval of Projects on Existing School Sites

Description: Discuss various projects on existing school sites which might necessitate:

- CDE approval
- CEQA compliance
- DTSC review and approval
- Title 5 health and safety studies (e.g., pipelines, railroads)
- Master planning site improvements
- Local bond funding v. State funding

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: John Dominguez
School Site Solutions Inc.
428 J Street Suite 370
Sacramento, CA 95814-2328
Phone: (916) 930-0736 Email: john@schoolsitesolutions.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Watch out for the Deep End ... A New Approach for a Competition Pool Complex

Description: The purpose of this workshop is to inform school district facility personnel and architects about Myrtha pools. A DSA approved modular stainless steel design that can be used for renovation of older pools and construction of new pools in California. Learn about the life cycle benefits and enhanced construction time lines compared to other traditional pool construction activities.

Submitted as: Workshop: Roundtable: Clinic:

Length: 1 or 1.5 hours

Interested In Moderating: Yes

Submitted by: Dave Doomey
David A. Doomey & Associates
83 Laurelhurst
Ladera Ranch, CA 92694-0204
Phone: (949) 374-6273 Email: davidadoomey@mac.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: DOWN IS UP - How to Handle the Increase in Bid Protests Created by the Down Economy

Description: A discussion on how to deal with the increase in bid protests created by the down economy on all types of school district contracts, including construction, purchasing, etc, The discussion will include tips and strategies for managing and responding to bid protests in the most efficient and cost effective way possible. Presentation will also address legal requirements, managing board presentations and expectations regarding bid protests, as well as examples of tactics used by protesting bidders.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Tyree Dorward
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101-8590
Phone: (619) 525-1346 Email: tyree.dorward@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Purchasing: Contracts - Adequately Protecting: Your District in the New Economy

Description: A discussion of tips and strategies for procuring all manner of purchases for school districts, including legal requirements and options as well as tips for bidding, negotiating, and contracting. The discussion will also address trends in contracts, and examples of contracting pit-falls, including recommended requirements and contracting clauses to avoid.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Tyree Dorward
Best Best & Krieger LLP
655 West Broadway 15th FL
San Diego, CA 92101-8590
Phone: (619) 525-1346 Email: tyree.dorward@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Facilities Master Plans and Bond Planning

Description: One of the key elements of a successful bond program is the development of a Facilities Master Plan. In this round table, we will discuss the elements of the FMP that have the most impact on the planning of a bond program and how to use that information to maximize your probability of passing the bond.

Co-submitted with Henry Petrino

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Dennis Dunston
Total School Solutions
4751 Mangels Blvd.
Fairfield, CA 94534-4175

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Developer Fees in a Down Market

Description: With the depressed state of the housing market, the justification and levying of developer fees has been a challenge to school districts throughout the State. This roundtable will go over some of the issues school districts have faced, including developer challenges, changes in the costs of site acquisition and construction, and the impacts of declining enrollment. Participants will share experiences and learn about potential traps to avoid and opportunities to pursue.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Larry Ferchaw
Dolinka Group Inc.
20 Pacifica Suite 900
Irvine, CA 92618-3396
Phone: (949) 250-8300 Email: lferchaw@dolinkagroup.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Digital Classrooms: Alignment of Facilities and Technology Best Practices

Description: We know we want technology in our classrooms. We have built some infrastructure. But, is it the right technology for teaching students? Is the technology truly enhancing our students' learning experiences? Is the staff embracing the technology? Can they embrace it? How do we bridge the gap between having technology-for-technology-sake and truly giving teachers a better and more productive tool with which to teach students? This roundtable will discuss game plans for creating liaisons between the IT/Technology staff that is leaving technology at the doorstep, and the curriculum staff and teachers who will use the technology to produce a creative standards-based learning environment.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Al Frangione
Capital Program Management Inc.
2150 Capitol Avenue
Sacramento, CA 95816-5748
Phone: (916) 553-4400 Email: al@capitalpm.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Stop Notices

Description: Discussion of the impacts of stop notices on a project, the public agency's duties, and how to deal with them

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Jeremy Jung
Best Best & Krieger LLP
655 W. Broadway 15th FL
San Diego, CA 92101
Phone: (619) 525-1300 Email: jeremy.jung@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Subcontractor Listing and Substitution

Description: Discussion of the subcontractor listing requirements and substitution procedure of the Subletting and Subcontracting Fair Practices Act, and tips and pointers in dealing with common problems.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Jeremy Jung
Best Best & Krieger LLP
655 W. Broadway 15th FL
San Diego, CA 92101
Phone: (619) 525-1300 Email: jeremy.jung@bbklaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Energy Efficiency Retrofits for Existing Facilities

Description: Discussion of opportunities schools have to become more energy efficient with fewer dollars through performance contracts, utility rebates, bright schools programs and traditional methods. The current fiscal climate is preventing many schools from being able to upgrade or improve their facilities. But with energy efficiency a school can reinvest dollars that are already being spent in their utility budgets to help finance improvements in a variety of areas. This not only helps the schools but the community because energy efficiency is the first step towards going green and lowering the carbon footprint of the buildings. Most districts don't realize the opportunities they currently have between the state and federal government incentivizing building owners and utilities to reduce the electric consumption with extra rebates and grants which means that now is the best time to explore this option and spread the word.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: David Klotz
TAC Energy Solutions
811 Wilshire Blvd. Suite 1450
Los Angeles, CA 90017-2606
Phone: (323) 472-0018 Email: david.klotz@tac.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Alternatives to Terminating Your Contractor

Description: Disputes are likely to arise on any project and handling them appropriately can be the difference between a minor inconvenience and a nightmare. We will focus on different methods of addressing disputes with contractors with an eye toward amicable resolution.

Submitted as: Workshop: Roundtable: Clinic:

Length: 1 or 1.5 hours

Interested In Moderating: Yes

Submitted by: Hugh Lee
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: hlee@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Navigating the Public Construction Minefield

Description: This workshop will address some of the more difficult issues commonly faced by school districts in the course of their construction projects. including drafting and enforcing liquidated damages provisions. proper licensure for contractors and professionals. and insurance requirements. We will also provide time-tested tips for avoiding claims.

Submitted as: Workshop: Roundtable: Clinic:

Length: 1 hour

Interested In Moderating: Yes

Submitted by: Hugh Lee
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: hlee@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Negotiating Energy Services Contracts

Description: This workshop will address the potential benefits and pitfalls of energy services contacts, exemption from public bidding, and common pitfalls.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Hugh Lee
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: hlee@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Why Are There Always Bid Protests on My Projects?

Description: Although you can't eliminate bid protests, this workshop/roundtable discussion will provide suggestions and practical tips to help minimize bid protests on projects. We will also review typical bid protest scenarios and recommendations on handling bid protests by District staff and award of contracts by the governing Board.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length: 1 hour

Interested In Moderating: Yes

Submitted by: Hugh Lee
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: hlee@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Becoming the Master of Your Universe: Paper is the Key

Description: A discussion of the characteristics of successful construction communications and filing systems, which facilitate quicker responses for your in-house and outside “bosses,” better-managed consultants, quicker turnaround on decisions and fewer claims.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Cheri Love
PubliConstructionLaw
P.O. Box 3084
Monterey, CA 93942-3084
Phone: (831) 656-1220 Email: cherilove@publicconstructionlaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Checklists for Success: Payments and Stop Notices

Description: Almost everyone involved in paying for public works projects understands the general concepts behind the prompt payment and stop notice system. Be the one that knows the rules inside and out and gets sued the least.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Cheri Love
PubliConstructionLaw
P.O. Box 3084
Monterey, CA 93942-3084
Phone: (831) 656-1220 Email: cherilove@publicconstructionlaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Maintaining Control of Your Own Projects: Managing Consultants to Avoid Surprises

Description: 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.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Cheri Love

PubliConstructionLaw

P.O. Box 3084

Monterey, CA 93942-3084

Phone: (831) 656-1220 Email: cherilove@publicconstructionlaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Nurturing Repeat Donors

Description: Building with privately donated funds can be rewarding, but it can also lead to donor dissatisfaction. Donors who could support multiple projects can be left with a negative perception of the District's management approach and disappear after a single project. Learn how to foster an appreciative relationship between donors and your school district.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Cheri Love

PubliConstructionLaw

P.O. Box 3084

Monterey, CA 93942-3084

Phone: (831) 656-1220 Email: cherilove@publicconstructionlaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Taming Your Sharks: Tips for Minimizing Your Legal Budget

Description: Discuss how to develop efficient communication procedures to enable your attorneys to perform your work at the least possible cost, and when including them in routine team communications will actually save you money.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Cheri Love

PubliConstructionLaw

P.O. Box 3084

Monterey, CA 93942-3084

Phone: (831) 656-1220 Email: cherilove@publicconstructionlaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Generate Revenue: Designing a Lease for Optimal Efficiency

Description: During times of fiscal uncertainty, school districts experience increased pressure to manage their assets wisely, and, if possible, to generate income from unused and underused real property. Even if minimal income is generated, it serves districts well to benefit the community by maximizing the use of surplus property rather than letting it remain unused. Gain practical tips for structuring leases, joint use agreements and joint occupancy agreements to benefit your district – and your bottom line.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Kathy McKee
Fagen Friedman & Fulfroost
1 Civic Center Drive #300
San Marcos, CA 92069-2952
Phone: (760) 304-6000 Email: kmckee@fagenfriedman.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: What is Your Green Building Action Plan?

Description: Going green may seem expensive, time consuming and nearly impossible to achieve in today's economy, yet the state and federal government expect all state entities to immediately and expeditiously undertake steps toward energy efficiency. Experienced education/real estate/energy attorney Kathy McKee will guide you through the practical do's and don'ts when structuring RFP's for energy contracts and the criteria for evaluation. Learn how to structure a deal that protects the district and environment's best interests.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Kathy McKee
Fagen Friedman & Fulfroost
1 Civic Center Drive #300
San Marcos, CA 92069-2952
Phone: (760) 304-6000 Email: kmckee@fagenfriedman.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: The Phantom Subcontractor

Description: In this competitive bidding environment districts are seeing more subcontractor substitution requests because the listed subcontractor is "too busy" to perform. Really? How should a district respond when it believes the listed subcontractor is simply a "placeholder" to permit the prime to bid-shop after award?

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: David Orbach
Orbach Huff & Suarez LLP
1901 Avenue of the Stars #575
Los Angeles, CA 90067-6001
Phone: (310) 788-9200 Email: dorbach@ohslegal.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Facility and Financial Management Compliance and Accountability

Description: Discuss the various 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. Your facility and financial management accountability program should::

- manage program and project activity from inception to closeout;
- manage and track program and project revenues, budgets, contracts, encumbrances, change orders and expenditures;
- monitor current and future cash flow;
- report on all aspects of the facilities funding plan.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Patricia Paulsen
Calif. Financial Services
6815 Fair Oaks Blvd. Suite 1
Carmichael, CA 95608
Phone: (916) 733-0400 Email: ppaulsen@calschools.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Project Delivery Methods – Strengths and Weaknesses from an Owner’s Perspective

Description: School district facility managers are faced with ever increasing challenges with developing and maintaining their capital assets. These challenges include aging facilities, limited funding, and increasing enrollments. This is further compounded by the demands of additional classroom needs, technology, security, sustainability, and community usage.

Districts have struggled for years with determining how to balance these needs within their design and construction procurement process. As a result, many districts have enacted legislation for the use of alternative delivery methods. These delivery methods bring with them subtleties relative to best project usage and contracting, which is very different between the public and private sectors.

The session will cover the strengths and weaknesses from an owner’s perspective of the Traditional, CM-at-Risk and Design-Build Delivery Methods, and the Bridging Method. Bridging is a hybrid of the Traditional and Design-Build Methods, using the best aspects of each from an owner’s perspective.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Charlie Raubacher
Parsons Brinckerhoff

121 West Trade Street Suite 1950
Charlotte, NC 28202
Phone: (704) 342-5416 Email:

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Geohazard and Environmental Screening of Prospective School Sites in the Internet Age

Description: Recent advances in internet mapping applications have converged with new government databases to allow School District facility planners to rapidly screen candidate school sites and perform preliminary geohazard and environmental evaluations online using only their web browser without specialized equipment, or specialized training. This could allow budget strapped districts to focus limited resources on sites that have fewer problems generating lower costs and improved schedules with less complicated DTSC, DSA and CDE approvals.

Demonstrations of the various options available will be made to facilitate discussion.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Jeffry Reardon
Haley & Aldrich Inc.
500 S. Kramer Blvd. Ste. 370
Brea, CA 92821-6702
Phone: (714) 985-3434 Email: jbr@haleyaldrich.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Labor Compliance After SB 9 and transfer of Prop. 47 and Prop. 55 funds to Prop. 1D

Description: SB 9 authorizes the Department of Industrial Relations to enforce prevailing wage laws in lieu of school or community college districts for a fee to be assessed on "bond proceeds" or "total project costs" (there is more than one term used). DIR is in the process of drafting new regulations to implement SB 9. Many district's LCP have lapsed because the district contracted with third-party LCPs to enforce prevailing wage laws. SB 9 allows districts with current LCPs to apply for waivers from the fees but will not allow a waiver for a district that contracts with a third-party LCP. As a result, district must choose to pay DIR a fee for LCP or to pay DIR its fee and also pay the third-party. A complicating factor is that the critically overcrowded schools (COS) funds from Prop. 47 and Prop. 55 are to be transferred to Prop. 1D for new construction projects. Prop. 47 and 55 required LCP enforcement but Prop. 1D did not.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Paula Schaefer
Miller Brown & Dannis
301 E. Ocean Blvd. Suite 1750
Long Beach, CA 90802
Phone: (562) 366-8500 Email: pschaefer@mbdlaw.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: CHARTER SCHOOL FACILITIES – A DISCUSSION OF HARDSHIPS AND OPPORTUNITIES

Description: Roundtable discussion of charter school facilities issues. Focus will be predominately on Proposition 39 charter school facilities obligations and roundtable discussion of developments and individual “war stories” arising out of our first year dealing with charter school facilities requests and negotiations under the new revised Proposition 39 regulations.

Other charter school facilities related issues will also be open for discussion, including longer-terms facilities use options and things you should think about in these difficult budgetary times.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: William Schuetz
Fagen Friedman & Fulfroost
70 Washington Street Suite 205
Oakland, CA 94607
Phone: (510) 550-8200 Email: wschuetz@fagenfriedman.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Dynamic Pricing Rate Structures: Is Your School District Ready?"

Description: The California Public Utilities Commission (CPUC) recently ordered Pacific Gas and Electric Company (PG&E) to adopt a dynamic pricing timetable and rate design guide (Decision 08-07-045). Dynamic pricing refers to electric rates that reflect actual wholesale market conditions at the time of use.

This roundtable discussion would explain the concept of dynamic pricing, as well as how to avoid pitfalls and take advantage of the opportunities offered to lower energy bills. Two specific options for reducing energy costs based on dynamic pricing, installing automated systems and storing energy, will be briefly explained. The discussion will be geared toward smaller school districts as most large school districts are already familiar with this concept. Solutions discussed will be generic and non-product specific.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Tim Sisson
Trane
4145 Del Mar Avenue
Rocklin, CA 95677-4041
Phone: (916) 577-1159 Email: timothy.sisson@trane.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: School Site Acquisition: Buying Cheap and Fast

Description: Site acquisition in California is heavily regulated. This results in the need for many consultants working together on different tracks over a long period of time. This roundtable is designed to give quick tips on making the average school site purchase go more quickly and cost effectively.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Jerry Suich
Oxbridge Development Inc.
2513 Broadway
San Francisco, CA 94115-1113
Phone: (415) 931-1920 Email: jj@oxdev.net

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Universal Design Concepts for California Schools

Description: Learn about and discuss the latest concepts in Universal Design for educational facilities that fully support inclusiveness, user-friendliness, adaptability and of course accessibility. Roundtable moderators: Sally Swanson, CEO, Sally Swanson Architects, Inc.; and Michael Mankin, DSA's Supervising Architect for Universal Design.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Sally Swanson
Sally Swanson Architects Inc.
490 Post Street Ste. 830
San Francisco, CA 94102-1409
Phone: (415) 445-3045 Email: sswanson@swanarch.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: How to Identify a Claims Oriented Contractor

Description: Tips on handling a contractor that submits a change order request before he or she even mobilizes onto the project site. Topics will include effectively using the contract documents to counter claims, coordinating consultants to assist the owner, evaluating claims for early resolution. and proper documentation in preparation for litigation

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Terry Tao
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: ttao@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Keeping Your Consultants and Contractors in Line and How to tell When They Are in Financial Distress

Description: Contactors, architects, and engineers have been hit with the current economic downturn and often can't finance or carry projects. This roundtable addresses tips for identifying, working with, and also discontinuing services when necessary.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Terry Tao
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: ttao@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Project Close Out: The Basics

Description: Close out is the part of a project that many consultants never complete. These are the basics on what needs to be done to ensure satisfying DSA requirements and to ensure the project is certified complete.

Submitted as: Workshop: Roundtable: Clinic:

Length:

Interested In Moderating: Yes

Submitted by: Terry Tao
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: ttao@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: What's My Line: Roles and Responsibilities of the Board, Superintendent, and Staff in a Construction Project

Description: During a construction project there are many people who have a vested interest in the result. This workshop defines each of the roles and responsibilities of the board, superintendent, assistant superintendent, facilities director, facilities staff and consultants. Each party plays a role and if the roles are properly defined it helps the project run better.

Submitted as: Workshop: Roundtable: Clinic:

Length: 1 hour

Interested In Moderating: Yes

Submitted by: Terry Tao
Atkinson Andelson Loya Ruud & Romo
17871 Park Plaza Drive Ste. 200
Cerritos, CA 90703-8597
Phone: (562) 653-3200 Email: ttao@aalrr.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Proposition 39 Performance Audits

Description: Performance audits are a California State Constitutional requirement for all Proposition 39 bond programs. A comprehensive performance audit provides a clear and complete overview of the functioning of your bond program. This holistic perspective allows for maximizing operational efficiency, saving significant fiscal resources and often extending the utility of the bond funds.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Nancy Walker
Total School Solutions
4751 Mangels Blvd.
Fairfield, CA 94534-4175
Phone: (707) 422-6393 Email: info@totalschoolsolutions.net

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Let The Sun Heat Your School Pool: Tips to Structure Effective Energy Savings Agreements

Description: Against a backdrop of concern for the environment, skyrocketing energy costs, rolling blackout in the summer of 2001 and persistently high energy costs thereafter, the California state legislature passed A.B. 127 in 2006. School districts are now required to consider energy savings methods in any funding application to OPSC. One of California's leading attorneys in school facilities and energy management will guide you through application tips for: conservation; load reduction technologies; peak load shifting; solar water heating technologies; ground source temperatures for heating and cooling (geothermal); photovoltaics and emerging technologies that will become the norm as the state and nation pursue sustainable construction and renovation projects.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Mark Williams
Fagen Friedman & Fulfroost
1879 Stratton Circle
Walnut Creek, CA 94598
Phone: (510) 550-8228 Email: mwilliams@fagenfriedman.com

Strands Submitted to: FM: HP: MO: P: SA: SC:

Title: Tips and Tools for Planning and Contracting for an Administration of Public Works Projects in Challenging Times

Description: This roundtable discussion will engage participants to share tips and tools. both practical and legal. that can be used to plan and contract for and to administer construction projects in these tough economic times. Discussion topics include whether to competitively bid or use other delivery methods. pros and cons of pre-qualifying prospective bidders to determine their financial qualification. recommended changes to bid and contract documents to reflect the risks and uncertainties in project funding and financial vulnerability of contractors and subcontractors, methods to administer a project and resolve problems to avoid costly litigation,

and other topics school districts face in planning and contracting for, and administering public works projects during these challenging times.

Submitted as: **Workshop:** **Roundtable:** **Clinic:**

Length:

Interested In Moderating: Yes

Submitted by: Maiya Yang
Liebert Cassidy Whitmore
5701 N. West Avenue
Fresno, CA 93711-2366
Phone: (559) 256-7803 Email: myang@lcwlegal.com

Strands Submitted to: FM: HP: MO: P: SA: SC:
