

87 Steps to a Successful Project



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Assumptions

- **This presentation assumes that the following have been completed:**
 - School Facilities Master Plan
 - Need for a new school has been determined
 - Student projections have been completed
 - General site locations have been identified
 - Funding program in place



Project Components

- **Select Design Team**
- **Educational Specifications**
- **Site Selection**
- **Pre-Design**
- **Site Design**
- **California Environmental Quality Act (CEQA)**
- **Site Approval**
- **Site Acquisition**
- **Bid Process**
- **Construction**
- **Project Closeout**
- **Furniture & Equipment**



Select Design Team

- **Prepare Request for Qualifications (RFQ) for architectural services**
- **Create selection process**
- **Advertise RFQ as public notice**
- **Create short list of candidates**
- **Select architect using a selection panel**
- **Take architect selection/qualifications to the Board**
- **School Board approval and contract execution**



Educational Specifications Tasks

- Required by the California Department of Education (CDE)
- Establish committee – Should consist of a mix of individuals including teachers, administrators, and clerical staff, community members and students (committee can utilize an architect as a resource)
- Assign committee members to sections according to their area of expertise – Each member is responsible for compiling information pertinent to their section



Educational Specifications Tasks

- Establish program requirements and wants list
- Complete Draft – Present draft to Superintendent's Cabinet
- Prepare Final Document – Present to Board of Education for approval
- Implement New Document – Circulate to Architects for their use in developing design plans



Site Selection Tasks

- Determine general location for school site based upon projected growth trends
- Search for three sites in accordance with CDE guidelines
- Gain permission to access potential sites
- Meet with CDE representative for preliminary evaluation of potential sites
- Finalize preferred site with your Board of Education



Pre-Design Tasks

- Request legal description and permission to access from property owner/developer
- Request Phase I/Environmental Site Assessment and Geotechnical Hazards reports from consulting firm
- Submit completed Phase I report to CDE for Department of Toxic Substance Control (DTSC) review
- Request Preliminary Title Report
- Request Topographic Survey
- Request Soils Report



Site Design Tasks

- Provide Architect with Educational Specification
- Provide Architect with technical studies gathered in pre-design
- Put together Planning Committee/Design Team
- Coordinate a series of Charettes/Planning meetings
- Along with Architect, facilitate planning charettes to complete school design



Site Design Tasks

- Throughout the process, the Architect will provide plans for review
 - Schematics
 - Design Development
 - Construction Documents



Site Design Tasks

- Following design:
 - Construction documents are finalized
 - A conceptual schedule is set
- Submit plans to Division of State Architect (DSA) for review and approval
- Submit plans to CDE for review and approval
- Submit plans to Office of Public School Construction (OPSC) for review and approval
- Submit plans for local agency review



CEQA Tasks

- Prepare the Initial Study (if needed) –
If an Environmental Impact Report (EIR) is determined to be necessary, an initial study need not be prepared
- Determine what level of environmental analysis must be prepared



CEQA Tasks – Negative Declaration

- Prepared when the district determines after the initial study that the project does not have a significant effect on the environment
- Mitigation measures can be included to avoid significant effects – in this case, you would be completing a *Mitigated* Negative Declaration
- A 30-day public review period must be allowed – 15 copies of the document must be submitted with a Notice of Completion to the State Clearinghouse



CEQA Tasks – Negative Declaration

- Post Notice of Availability with the County Clerk and publish Notice at least one time in a newspaper of general circulation (or direct mail the notice to contiguous property owners, or post notice on and off the site)
- Following the 30-day review, address all comments in writing and take the Negative Declaration and comments to the Board for a public hearing and certification
- File Notice of Determination (NOD) and *De Minimis* Statement with the County Clerk within 5 working days of certification – a fee may be required to file



CEQA Tasks – Notice of Preparation of an Environmental Impact Report

- Prior to the completion of a Draft EIR, a Notice of Preparation (NOP) should be completed
- Circulate the NOP through the State Clearinghouse for 30 days – take 15 copies of the NOP and a Notice of Completion to the Clearinghouse for filing



CEQA Tasks – Notice of Preparation of an Environmental Impact Report

- Post Notice of Availability with the County Clerk and publish Notice at least one time in a newspaper of general circulation (or direct mail contiguous property owners or post notice on and off the site)
- A scoping meeting near the close of the review period is optional



CEQA Tasks – Environmental Impact Report

- Use information gathered through the NOP process to assist in completing a Draft EIR
- A 45-day public review period must be allowed to begin the review period. 15 copies of the document must be submitted with a Notice of Completion to the State Clearinghouse
- Post Notice of Availability with the County Clerk and publish Notice at least one time in a newspaper of general circulation (or direct mail to contiguous property owners or post notice on and off site)



CEQA Tasks – Environmental Impact Report

- At the end of the 45-day review period, a public hearing can be held allowing another opportunity for public comment – this practice is encouraged by CEQA
- All comments on the Draft EIR must be addressed in a Final EIR
- The Final EIR must be circulated for 10 days prior to Board of Education certification – A Final EIR should be sent to all persons and agencies that commented



CEQA Tasks – Environmental Impact Report

- Complete Mitigation Monitoring and Reporting Plan (MMRP) as well as a Statement of Findings of Fact and Overriding Considerations as necessary for certification
- Board Certification of the FEIR and adoption of the Findings of Fact and Statement of Overriding Considerations and MMRP
- File Notice of Determination and *De Minimis* Statement with the County Clerk within 5 working days of certification – a fee may be charged to file



Site Approval Tasks

- Secure Planning Commission report regarding school site
- Gain approval of site from Department of Transportation Division of Aeronautics
- Gain approval from local air quality management district
- Gain approval from DTSC
- Complete CDE 4.01 Site Approval Package and submit to CDE



Site Acquisition Tasks

- Secure final or conditional site approval letter from CDE
- Commission appraisal(s)
- Secure authority to negotiate price from your Board of Education
- Make offer to property owner based upon appraised value
- Secure approval from your Board of Education for the purchase agreement and acceptance of the grant deed



Site Acquisition Tasks

- Get legal counsel approval of escrow instructions
- Open escrow, forward deposits where applicable
- Secure ALTA title policy survey
- Close escrow
- Obtain original grant deed
- Obtain final site acquisition approval from CDE if hardship
- Forward project to OPSC for funding approval



Bid Process Tasks

- Decide if you are going to:
 - Use a Construction Management (CM) firm
 - Pre-Qualify bidders
 - General Contractors only?
 - Sub-Contractors?
- Obtain Board approval to go to bid
- Advertise bid
 - Minimum of (2) times in a newspaper of general circulation
 - Make sure contractors have at least 4 to 6 weeks to find sub's and get "prices" before bids are opened



Bid Process Tasks

- Job Walk
 - Mandatory Yes/No
- Additive/Deductive Alternates (flexibility)
 - Maximum of (3) allowed
- Bid Opening
 - Verify that each bid is complete (signature/bonds/addendums/non-collusion/veterans good faith effort/etc.)
 - Announce "apparent low bidder"
- District "Due Diligence"
 - Check Bonds/Licenses/etc.



Bid Process Tasks

- Board Awards Bid
 - Sign Contract(s)
 - Verify payment and performance bonds
 - Hold pre-construction meeting
 - Parking/staging areas/construction storage/job trailers/temp power/etc
 - Review construction schedule
 - Issue Notice to Proceed
- Higher Project Inspector (must get approved from DSA)
 - **CRITICAL ITEM** – PI can “make or brake” project



Construction Tasks

- Don't Panic
 - The “hardest” part is now over
 - Remember:
 - You don't actually “build” the school
 - Let the contractors do their job
 - **Insure that everyone involved communicates and that there are NO SURPRISES**



Construction Tasks

- Your job is now is to:
 - Read and understand the PI daily reports
 - Attend the weekly Job Site meetings
 - Be decisive
 - Use common sense
 - Pick your battles
 - Minimize owner initiated change orders
 - Expedite the approval of submittals (especially long lead-time items such as windows and casework)
 - Don't let the project schedule slip
 - Critical path/mile stones/etc



Project Closeout Tasks

- Do your final walk/punch with the contractor before ANYONE or ANYTHING is allowed into the buildings
- Coordinate training/in-service with both district level and site level staff
- Negotiate the value of any unfinished “punch list” items
- File “Notice of Completion” (NOC)
- If the project has runs past the contract completion date
 - negotiate actual delay cost in-lieu of Liquidated Damages
- Hold 125% of any and all Stop Notices
- Release retentions 35 days after NOC was filed



Furniture & Equipment Tasks

- Establish budgets
 - Designate individuals responsible for placing orders and approving expenditures (i.e. the new principal)
 - Plan and prioritize to make sure “basic” classroom needs (i.e. desks and chairs) are taken care of before money is spent on “other” needs such as computers



Furniture & Equipment Tasks

- Communication
 - Make sure the principal knows if some of the F & E money is really someone else’s to spend (such as the maintenance department’s to buy a buffer for the custodian or a mower for the grounds man)
 - Coordinate the delivery/move-in of the furniture with the contractor
 - Timing of deliveries is critical (not too soon not too late)