



CALIFORNIA'S  
COALITION *for* ADEQUATE SCHOOL HOUSING

**"SELECTING YOUR CONSTRUCTION PROJECT TEAM"**

**JULIE ARTHUR**  
San Jacinto Unified School District

"School Construction 101/201"

Tuesday, October 18, 2005  
12:00 p.m. to 4:00 p.m.  
Hilton Costa Mesa  
3050 Bristol Street  
Costa Mesa, California

## Selecting Your Construction Project Teams

Consultant Service	Description of Task to be Performed	Consultants reports to:	Recommended by District size
Legal Counsel	Reviews and recommends contracts for <ul style="list-style-type: none"> <li>▪ Architectural Services Consultant Contract</li> <li>▪ Site Acquisition /School Acquisition Contracts</li> <li>▪ Construction Consultant Contract (CM, GC, etc.)</li> </ul>	District	All Districts
Financial Planning Consultants	District to form long term financing plan: <ul style="list-style-type: none"> <li>• Financial Planning/OPSC Assistance</li> <li>• Community Finance District (CFD)</li> <li>• GO Bond</li> <li>• Certificates of Participation</li> <li>• Grant Eligibility</li> <li>• OPSC forms and submittal</li> <li>• Audit Assistance</li> <li>• CDE and OPSC issues</li> </ul>	District	All Districts
Architect	Works in conjunction with District and all consultants: <ul style="list-style-type: none"> <li>▪ Plans site layout</li> <li>▪ Prepares Educational Specifications for CDE</li> <li>▪ Preliminary Endangerment Assessment (PEA) mitigation team</li> <li>▪ Civil Engineer</li> <li>▪ Mechanical/Electrical/Structural Engineers</li> <li>▪ Landscape Architect</li> <li>▪ Kitchen Design Consultant</li> <li>▪ Construction drawings submitted to DSA and CDE</li> <li>▪ Plans submitted to OPSC</li> <li>▪ Kitchen Design Consultants</li> <li>▪ Five Year Facility Plan</li> </ul>	District	All Districts
Site Acquisition Consultants	Coordination of Site Acquisition Process <ul style="list-style-type: none"> <li>▪ Assist in site identification and Viability</li> <li>▪ CDE Site Review process</li> </ul>	District	Small and Medium
Appraisers	Self-Contained Appraisal for land purchase	District	All Districts
Escrow Company	Escrow for land purchase	District	All Districts
Geotechnical Consultant	<ul style="list-style-type: none"> <li>▪ Phase I</li> <li>▪ Geohazards Studies</li> <li>▪ Soils Testing</li> <li>▪ Preliminary Endangerment Assessment (PEA)</li> </ul>	District	All Districts
CEQA/ Environmental Consultants	California Environmental Quality Act preparation for <ul style="list-style-type: none"> <li>• New School Site</li> <li>• Addition of more than 10 classrooms on existing site</li> </ul>	District	All Districts

Construction Manager (CM)	<ul style="list-style-type: none"> <li>• Pre-Construction (Estimates)</li> <li>• Constructability review</li> <li>• Bid Documents to Bid Award</li> <li>• Scheduling of work/Prime Contractor Supervision</li> <li>• Supervise Construction Process</li> <li>• Pay Application process</li> <li>• Close Out Documents/Warranty</li> <li>• Site Safety Compliance</li> </ul>	District	All Districts
General Contractor	<ul style="list-style-type: none"> <li>• Single Prime Contractor</li> <li>• 'Hard Bid'</li> <li>• Work awarded to lowest bidder</li> <li>• Oversees schedule and sub-contractors on project</li> <li>• Handles Pay Applications and Close-out documents</li> </ul>	District	All Districts
Surveyor	<p>Either District or Construction Management Contract:</p> <ul style="list-style-type: none"> <li>• Surveys for new school sites</li> <li>• Sets corners, grade stakes, etc.</li> </ul>	District or Construction Manager	All District
Multi-Prime Contractor	Individual Trade Contractor working under Multi-Prime Construction Management Contract	District	All Districts
Storm Water Prevention Plan Consultants	Storm Water Prevention Plan and Construction Monitoring	District or CM	All Districts
DSA Inspector	<ul style="list-style-type: none"> <li>• Handles on site inspection for construction project</li> <li>• Oversees construction Specialty Testing Services</li> <li>• District pays inspector but inspector works with Architect</li> </ul>	Architect	All Districts
Materials & Specialty Construction Testing Services	<p>Handles Testing and Review of the following work:</p> <ul style="list-style-type: none"> <li>• Soils</li> <li>• Concrete</li> <li>• Masonry</li> <li>• Moisture Tests</li> <li>• Compaction</li> <li>• Welding</li> <li>• Other Specialty Tests</li> <li>• Works under on-site DSA Inspector</li> </ul>	District	All Districts
Bank	<ul style="list-style-type: none"> <li>• Contractor Construction Payments dispersed through Escrow or Trust Account</li> </ul>	District	Small or Medium Districts
Furniture and Equipment Consultant	<p>Handles ordering and purchasing requirements:</p> <ul style="list-style-type: none"> <li>• Meets with Facility Staff and New School Principal</li> <li>• Helps in procuring furniture, equipment and supplies to open new school</li> <li>• Color coordination</li> <li>• Field Measurements for furniture</li> <li>• Works within Purchasing regulations as outlined in Government Codes</li> <li>• Receive and checks in furniture at school sites</li> <li>• Prepares warranty information books</li> </ul>	District	Small and Medium Districts
Lobbyist	Presents District Special Requests to State Allocation Board	District	All Districts