

**DRAFT**

# **MEASURE A**

Bond Implementation Process

# Planning Phase – Value Goals

Minimize cost for interim housing, phasing and moving through project planning

- At High Schools, develop growth projects first to build capacity and reduce need for interim housing
- Build sequentially to avoid ‘double moves’ (All projects)
- Choose site locations to allow building without extensive phasing (Ohlone Classroom Bldg)

# Planning Phase – Value Goals

Group similar or compatible projects for efficiency and to reduce design fees

- At Palo Alto HS, grouped Classroom Bldg and Media Arts into one project, reducing design fee percentage overall
- Teaching wall project, district-wide implementation vs. campus by campus implementation

# Planning Phase – Value Goals

Plans shall be adaptable and flexible to meet changes in enrollment, technology or construction

- Created reserve funds for Elementary and Middle Schools to allow for future changes in enrollment on back end of program
- Separate funds set up for technology and furnishings/equipment needs

# Planning Phase – Value Goals

## Develop a budget strategy for High Schools, Middle Schools and Elementary Schools

- At High Schools, board adopted plan to establish a budget for each school that their facilities steering committee will use to prioritize projects
- At Middle Schools, each campus developed a project list and prioritized needs to within budget allocation approved by the board.
- At Elementary Schools, board adopted plan to separate funding for modernization work, conversions of portable classrooms to permanent classrooms, new classroom construction and library expansions

# Planning Phase – Value Goals

Leverage bond funds and strategy for application for state and other funding sources

- Applying for state modernization funds for field projects at Gunn and Palo Alto high schools
- Applying for state new construction funding on new classroom building projects
- Applied for and received grant funding for Career Tech Ed programs at Gunn HS. Plan to submit for this funding at Palo Alto HS

# Planning Phase – Value Goals

## Leverage current bid climate with quick start projects

- Used donated funds and building project funds to design projects for early bid
  - Gunn HS Aquatic Center
  - Gunn HS Industrial Arts Renovation
- Accelerated high priority projects for early start
  - Garland Elementary School and Ohlone Elementary School

# Planning Phase – Value Goals

## Explore joint-use of facilities with community stakeholders

- Joint-use with City of Palo Alto for fields and athletic facilities at the Elementary and Middle Schools
- Palo Alto Community Child Care (PACCC) provide child care for the city's children on District sites.
- Rental of facilities to various community groups after school, on weekends and during the summer
- Preliminary meetings with community stakeholders on bond program to communicate opportunities for other joint-use funding options



# Design Phase - Value Goals

## Negotiate competitive fees for professional services

- Utilized OPSC architect's fee scale in negotiating design fees with AEDIS, DLM and Gelfand Partners
- Group projects to leverage sliding scale of architect's fee schedule, such as the new classroom building and media arts projects at Palo Alto HS
- Negotiate task-based fees for other consultants providing singular service, such as Geotechnical surveys, topo surveys or traffic studies

# Design Phase - Value Goals

## Manage “scope creep” and implementing project cost controls

- Implemented process to have Board approval of conceptual design and schematic design packages, along with associated budgets
- All program changes from original program during design must be approved by Bond Program Manager
- Developed district standards and will review plans throughout design phases to adhere to these standards

# Design Phase - Value Goals

## Utilize construction professionals during design

- Gilbane Building Company manages design phases from design development through closeout
  - Currently managing Gunn Aquatic Center, Industrial Arts, Paly Fields projects and most recently, Ohlone new classroom building
- Maximize expertise of construction professionals on issues regarding schedule, cost and quality during design phase, such as planning for portable relocation at high schools
- Development of team earlier in project development creates common understanding of project decisions and issues through construction

# Design Phase - Value Goals

## Actively manage design teams and their schedule

- Develop a master project work plan to coordinate efforts of architect and all district consultants
- Ensure survey information is completed in timeframe to allow project development to proceed on schedule – soils and topo surveys completed for high schools, Ohlone and Garland
- Meet bi-weekly with design teams to review progress sets, provide input and feedback to architect
- Schedule stakeholder meetings on routine basis so that decisions requiring their input are made within the appropriate timeframe. At high schools, facilities steering committees meet monthly, and departmental stakeholder meetings are held each week

# Design Phase - Value Goals

## Require quality design services and documents

- Architect contracts call for standard deliverables from architect at each project milestone to ensure progress is in line with industry standards
- Detailed agendas and meeting reports are posted online and distributed within week of meeting to document input and progress

# Design Phase - Value Goals

## Budget contingencies to cover unforeseen costs or changes

- Incorporate pools of unallocated funds at all levels of program to allow flexibility in project development
- Established general reserve
- Project level contingencies in budgets (3% of project cost)
- Change order contingencies (10% of construction cost)
- Design contingency during design
- Unused contingencies are returned to applicable reserve fund to fund next high priority project

# Design Phase - Value Goals

**Emphasize sustainability, high performance and long term cost benefit of systems and equipment selection**

- All new construction and modernization work follow Collaborative for High Performance Schools (CHPS) best practices
  - CHPS scorecards submitted at each phase for verification – Garland currently targeting 40 CHPS credits, Ohlone targeting 42 CHPS credits
- Make project, maintenance and facility decisions with sustainability and cost benefit analysis in mind.
  - Currently studying central plant options for Palo Alto HS.
  - Reviewing alternative heating and ventilating systems for Garland and Ohlone elementary school

# Design Phase - Value Goals

Establish facility and district standards for efficient construction and maintenance of facilities

- Established design criteria (performance based) and technical standards (prescriptive based) to provide common expectations for new and renovated facilities
- Technical standards create labor and cost efficiency for maintenance and operation of facilities
- Technical standards have quality 'built in' in low bid public work environment



# Design Phase - Value Goals

Utilize pilot projects for review prior to district-wide implementation of standards

- Utilizing pilot project in teaching wall implementation in elementary schools to allow teacher input and feedback prior to implementing on district-wide basis

# Construction Phase - Value Goals

## Designate allowable mark up on change orders in contract documents

- Contracts specify that allowable change order mark up is 15% on self performed work, and 5% on work performed by a subcontractor.
- Mark up is defined as inclusive of any and all overhead expenses, including small tools, truck expenses, bonds, insurance, etc.

# Construction Phase - Value Goals

Require quality control during construction and adherence to contract documents

- In addition to DSA required inspection, Gilbane Building Company also provides site supervision to insure contract requirements are met

# Construction Phase - Value Goals

## Proactive management of construction to avoid delays

- Weekly meetings include review of look ahead schedules to address potential delays that could affect work
- Aquatic Center and Industrial Arts projects incorporate weather delay days into contract schedule to address delays due to inclement weather
- Diligent problem solving efforts to ensure timely decisions are provided to the contractor prior to starting the work
- Gilbane holds re-installation meetings to set quality expectations prior to beginning the work.

# Construction Phase - Value Goals

Process payments in a timely manner to promote productivity during construction

- Set goal to process payments to contractors in 15 to 30 days of invoice approval to avoid stop notices and other non-payment issues, and to encourage performance

# Construction Phase - Value Goals

## Minimize design changes during construction

- All program changes must be approved in advance by the Bond Program Manager, with justification, cost and schedule impacts included within recommendation
- Construction documents QA efforts aim to reduce design-related changes during construction
- Budget for additional construction work outside of main construction contract to allow changes to happen without impacting major construction contract

# Construction Phase - Value Goals

Analyze and negotiate change orders to maximize value to the district

- Requiring demonstration of entitlement to change based on thorough contract document review – fair and reasonable determinations
- Compare contractor pricing to cost databases and vendor quotes
- Review labor rates against prevailing wage rates on certified payroll
- Require supporting documentation to justify costs submitted

# Construction Phase - Value Goals

## Manage projects with goal to avoid claims and litigation

- Empower project team to resolve issues at appropriate level to avoid costly delays
- Provide timely decisions on potential change issues
- Clear and reasonable risk allocation defined in construction documents and professional agreements



# Ongoing Review and Adjustments

- Annual review of program
- Budget management plans and allocation of reserves
- Review of enrollment and adjustments to growth planning
- Technology, Furnishings and Planned Maintenance funds allocations
- Performance audits
- Update master plans, district standards and educational specifications
- Actively monitor cost trends and adjust budgets accordingly
- Monitor industry trends and make project decisions based on risk – benefit analysis