

Department of General Services
Public School Design & Construction Process Program Review
Program Review Expert Workgroup – **Closeout** Sub-group Charter

Move In & Project Close-Out Sub-group Chair:

James Sohn, Los Angeles USD

Move In & Project Close-Out Sub-group Team Members:

1. Pablo Manzo, Los Rios CCD
2. Jennie Bruneman, Santa Rosa USD
3. Art Hand, Lodi USD
4. Chris Ferguson, Dept of Finance
5. Fred Yeager, California Department of Education
6. Steve Inman, Office of Public School Construction
7. Craig Rush, Division of the State Architect
8. Maria Ploog, Fiscal Crisis & Management Assistance Team

Mission Statement

To build safe, timely, cost effective, and educationally appropriate school facilities for the students of California.

Background

In response to the recent Assembly Education Oversight Committee hearing and with the State Allocation Board's encouragement, the Department of General Services is pursuing a collaborative effort to identify and institute improvements to the public school design and construction processes.

Goal

To recommend improvements to the planning portion of the public school construction process, while noting those aspects of the process that are working well.

Objectives

1. In one meeting, identify and prioritize the top ten problems and issues in the **move in and project close-out** process. Note processes and policies that are working well (best practices).
2. To recommend solutions to the problems and issues identified by the type of change needed (legislative, regulatory, policy, procedural, education/training, communication, collaboration).
3. To recommend timeframes for implementing the proposed solutions:
 - Short Term (within 3-12 months)
 - Intermediate (within 12-36 months)
 - Long term (within 36-60 months).
4. To recommend performance measures to determine the effectiveness of each recommended solution.

Scope

Limited to Public School Construction Closeouts.

Responsibilities of Participants

1. Attend the meeting scheduled on Tuesday, August 10th, 2010.
2. Complete the reporting template for presentation to the Expert Workgroup

Ground Rules:

1. Physical attendance is required.
2. No substitutes are allowed.
3. No visitors are allowed.
4. No PDAs

WHAT IS WORKING:

- Willingness to work with districts
- Collaborative process with DSA is a step in the right direction
- Districts are proactive
- More attention being paid to closeouts



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Top 10 Problems/Issues (in priority order)	Proposed Solutions
	[note proposals as legislative (L), regulatory (R), policy (P), procedural (PR), education/training (ED), communication (Com), collaboration(C)
1. New Projects Held Up	1a. Adopt policy for sufficient evidence of progress (P) 1b. Written policy for health and safety projects to be approved (P) 1c. Method to include old scope/documents in new project (P/PR)
2. Consistency /Interpretation Applied/Documents/Access Compliance – ATF	2a. Educational policy (PR) <ul style="list-style-type: none"> • Define • Do cumentation • Dissemi nation • Verific ation 2b. Manage disputes (PR) <ul style="list-style-type: none"> • Timely/Quick turn around • Identify point of contact/Contact list • More robust dispute process
3. Extenuating Circumstances/Inability to Contact People/Exceptions	3a. Educate clients on project certification guide (PR) <ul style="list-style-type: none"> • Expand guide • I nstructions • Colla borative certification • Feedb ack (PR) 3b. Allow design professionals or the DSA approved IOR or the DSA structural engineer to certify adequacy of construction (P)
4. Volume of Documentation/Missing Documents	4a. Eliminate inspection documents that are DSA specific (PR/R) 4b. Uniformity of IOR/Closeout specialists (PR) <ul style="list-style-type: none"> • Educatio n process 4c. IOR identified as responsible party to collect closeout documents (R)
5. IR-A6 (change orders)	5a. Review and approve FLS, ACS, SSS change orders only (R) <ul style="list-style-type: none"> • Administrative change orders submitted for audit 5b. Implement construction change document (R) <ul style="list-style-type: none"> • used for non-technical changes
6. Certification of Portable Classrooms	6a. For legacy projects no in-plant inspection report required (P/PR) 6b. Streamline documentation for new portable buildings (PR/R)
7. Work Constructed without DSA Approval/Align Real Scope with DSA Submittal	

Note: Due to time constraints, proposed solutions were only discussed for the top six problems/issues.

SOLUTIONS TIMELINE



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Short Term (3-12 mos.)	Intermediate (12-36 mos.)	Long Term (36-60 mos.)
1a. Adopt policy for sufficient evidence of progress 1b. Written policy for health and safety projects to be approved 1c. Method to include old scope/documents in new project		
2a. Educational policy 2b. Manage disputes	2a. Educational policy	
3a. Educate clients on project certification guide 3b. Allow design professionals or the DSA approved IOR or the DSA structural engineer to certify adequacy of construction		
4b. Uniformity of IOR/Closeout specialists 4c. IOR identified responsible party to collect closeout documents	4a. Eliminate inspection documents that are DSA specific 4c. IOR identified responsible party to collect closeout documents	4a. Eliminate inspection documents that are DSA specific
5a. Review and approve FLS, ACS, SSS change orders only 5b. Implement construction change document used for non technical changes	5a. Review and approve FLS, ACS, SSS change orders only 5b. Implement construction change document used for non technical changes	
6a. For legacy projects no in plant inspection report required 6b. Streamline documentation for new portable buildings	6b. Streamline documentation for new portable buildings	

RECOMMENDED PERFORMANCE MEASURES:

	Proposed Solution	Recommended Performance Measure
1a.	Adopt policy for sufficient evidence of progress	Policy adopted
1b.	Written policy for health and safety projects to be approved	Written policy
1c.	Method to include old scope/documents in new project	Methodology created
2a.	Educational policy	internal program staff and external constituents trained
2b.	Manage disputes	<ul style="list-style-type: none"> • All appeals resolved within 30 days for plan check & 5 working days for field issues • Contact list • External customers would know how to escalate issues
3a.	Educate clients on project certification guide	Reduction in number of uncertified projects
3b.	Allow design professionals or the DSA approved IOR or the DSA structural engineer to certify adequacy of construction	Establish pilot program to assess performance
4a.	Eliminate inspection documents that are DSA specific	<ul style="list-style-type: none"> • Identify documents for elimination • Identify possible regulatory changes • Eliminate documents
4b.	Uniformity of IOR/Closeout specialists	<ul style="list-style-type: none"> • Reduction in paperwork • Trained IOR



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4c.	IOR identified responsible party to collect closeout documents	Implementation of program
5a	Review and approve FLS, ACS, SSS change orders only	Number of change orders reviewed decreases
5b.	Implement construction change document used for non technical changes	Implement change certification document (CDD)
6a.	For legacy projects no in plant inspection repot required	Certify more legacy relocatable buildings
6b.	Streamline documentation for new portable buildings	Reduction in documentation of new portable buildings

NOTED DISAGREEMENTS OVER TOP 10 PROBLEMS IDENTIFIED OR SOLUTIONS RECOMMENDED:

No items; no member requests for disagreements to be noted.



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