

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

**Funding Sub-group Chair:**

Jenny Hannah, Kern COE

**Funding Sub-group Team Members:**

1. Jim Watts, San Diego USD
2. Sandee Hackett, Val Verde USD
3. Craig Guensler, Wheatland ESD
4. Chris Ferguson, Dept. of Finance
5. Fred Yeager, California Department of Education
6. Dave Zian, Office of Public School Construction
7. Masha Lutsuk, Division of the State Architect
8. Mary Barlow, 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 **funding** 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 Funding.

**Responsibilities of Participants**

1. Attend the meeting scheduled on Wednesday, August 11<sup>th</sup>, 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:**

- Good support from OPSC at the project manager level
- Overcrowding Relief Grant program is matching district needs
- Joint-Use program is successful
- San Diego DSA leadership is always available
- State programs being available
- DSA has significantly reduced bin times
- Global interest to make it work
- Productive when school districts are involved
- Collaboration between districts and agencies



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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. Lack of definition of an adequate school/minimum essential facilities for School Facility Program projects	<p><b>1a.</b> CDE enhanced involvement in a collaborative process (regulations, define facilities, establish a baseline for adequate school facilities, consider and quantify costs) (P, L)</p> <p><b>1b.</b> Best practices approach: State to offer optional, pre-approved construction plans for school districts to access (no reductions to funding, education needed, vet process) (P)</p>
2. Grant adequacy <ul style="list-style-type: none"> <li>• Project vs. program</li> <li>• Geographic Index Factor</li> <li>• Construction Cost Index</li> <li>• One grant for all</li> <li>• Life-cycle costs</li> </ul>	<p><b>2a.</b> Collaborative process to establish a more equitable standard that offers more flexibility (review every three years) (L)</p> <p><b>2b.</b> Select/set standard annual Construction Cost Index (definition, timing/applicability, appropriate gauge, match to market) (L)</p> <p><b>2c.</b> Collaborative process to establish a standard for type of construction (incentive for long-lasting construction) (L)</p>
3. Insufficient level of expertise, best practices, education: for all stakeholders	<p><b>3a.</b> Establish an ombudsman (PR)</p> <p><b>3b.</b> Re-write regulations in simplified terms (P, R)</p> <p><b>3c.</b> Update and utilize best practices (P, PR)</p> <p><b>3d.</b> Expanded availability of county-level project managers (cost savings/cost sharing, regionalized, mid-level opportunities, funding) (R)</p>
4. Timing of eligibility and funding, restrictions on use of funding	<p><b>4a.</b> Establish New Construction eligibility prior to DSA plan approval (timing, expanding program to allow this, long-term [10-year] facilities plan) (L, P)</p> <p><b>4b.</b> Reduce timelines for full reimbursement projects (R)</p>
5. Process is too complicated and time-consuming	<b>5.</b> Make the application straight-forward (review current application; make needed modifications; question-driven; automated, interactive application) (R)
6. Financial Hardship program/need	
7. Total costs <ul style="list-style-type: none"> <li>• Site development</li> <li>• Time of review</li> <li>• Codes and process</li> </ul>	
8. Eliminate special interests that siphon funding/new programs	
9. Full and final	
10. Specialists for county offices of education	

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



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**SOLUTIONS TIMELINE**

Short Term (3-12 mos.)	Intermediate (12-36 mos.)	Long Term (36-60 mos.)
Policy portion of <b>1a.</b> CDE enhanced involvement in the process – development of policy	<b>1b.</b> State to offer optional, pre-approved school construction plans	Legislative portion of <b>1a.</b> CDE enhanced involvement – implementation of policy
		<b>2a.</b> Collaborative process to establish a more equitable standard with more flexibility <b>2b.</b> Select/set standard Construction Cost Index <b>2c.</b> Collaborative process to establish a standard for type of construction (incentive for long-lasting construction)
<b>3a.</b> Establish an ombudsman	<b>3b.</b> Re-write regulations in simplified terms <b>3c.</b> Update and utilize best practices <b>3d.</b> Expanded availability of county-level project managers	
	<b>4b.</b> Reduce timelines on full reimbursement projects	<b>4a.</b> Establish New Construction eligibility prior to DSA plan approval (timing, expanding program to allow this, long-term [10-year] facilities plan)
	<b>5.</b> Make the application straight-forward (review current application; make needed modifications; question-driven; automated, interactive application)	

**RECOMMENDED PERFORMANCE MEASURES:**

	Proposed Solution	Recommended Performance Measure
<b>1a</b>	CDE enhanced involvement	Definition of adequate facilities, established baseline, implemented policy
<b>1b</b>	State to offer optional, pre-approved plans	Increase in number of available, optional plans; Use of these plans
<b>2a</b>	Collaborative process to establish an equitable standard	Collaborative process put in place, establishment of an equitable standard
<b>2b</b>	Select/set standard Construction Cost Index	Consistent annual Construction Cost Index
<b>2c</b>	Collaborative process to establish a standard for type of construction (incentive for long-lasting construction)	Incentive created, higher quality (green) facilities being built, reduction in percentage of portable vs. permanent facilities being built
<b>3a</b>	Establish an ombudsman	Ombudsman established
<b>3b</b>	Re-write regulations in simplified terms	Re-written, simplified regulations
<b>3c</b>	Update and utilize best practices	Updated best practices, evidence of use of best practices
<b>3d</b>	Expanded availability of county-level project managers	Establishment of county-level project managers, use of county-level project managers
<b>4a</b>	Establish New Construction eligibility prior to DSA plan approval	Statutory change, implementation of 10-year plan
<b>4b</b>	Reduce timelines on full reimbursement projects	Reductions in timelines for full reimbursement projects
<b>5</b>	Make the application straight-forward	Review of current application conducted, new application available

**NOTED DISAGREEMENTS OVER TOP 10 PROBLEMS IDENTIFIED OR SOLUTIONS RECOMMENDED:**

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



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