

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

**Plan Review Sub-group Chair:**

Laura Knauss, Lionakis Beaumont Design Group

**Plan Review Sub-group Team Members:**

1. Bob Bradshaw, Citrus CCD
2. David Goldin, San Francisco USD
3. Michal Healy, Marysville Joint USD
4. Chris Ferguson or Thomas Todd, Dept. of Finance
5. Fred Yeager, California Department of Education
6. Ian Knutilla, Office of Public School Construction
7. Jim Hackett, Division of the State Architect
8. John Von Flue, Fiscal Crisis & Management Assistance Team

**Not in attendance**

**Mission Statement**

To build educationally appropriate school facilities that are safe, timely, and cost effective 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 **plan review** 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 Plan Review.

**Responsibilities of Participants**

1. Attend the meeting scheduled on Tuesday, August 10<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:**

- Collaborative process works when used
- Better project results
- When you take advantage of offered resources and plan ahead, it works.
- DSA is proactive in communication
- Stability of DSA process (compared to county) is good ("one stop shopping")
- Intake submittals and communication are improved (change order, reviews, deferred approvals)
- Statewide teams
- OPSC outreach (PVT)
- DSA's multiple venue communications
- DSA's willingness to listen and change



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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. Collaborative process/Interagency	<p><b>1a.</b> Single point of contact/Project manager at district level (P/PR)</p> <p><b>1b.</b> Single Agency (L)</p> <p><b>1c.</b> Set schedules &amp; teams (P/PR)</p> <p><b>1d.</b> Technology solutions (PR)</p> <ul style="list-style-type: none"> <li>o Electronic plan check</li> </ul>
2. Consistent & timely reviews/Regional Offices/Code interpretation/Complete process	<p><b>2a.</b> Training workshops – annual (PR)</p> <p>For:</p> <ul style="list-style-type: none"> <li>o DSA/OPSC/CDE/DOF</li> <li>o Designers/Architects</li> <li>o Districts</li> </ul> <p>Topics:</p> <ul style="list-style-type: none"> <li>o Policies</li> <li>o Procedures</li> <li>o Updates</li> </ul> <p><b>2b.</b> Continuity between regional offices &amp; programs (P/PR)</p> <ul style="list-style-type: none"> <li>o Build accountability</li> <li>o Consistent policies</li> <li>o Statewide teams <ul style="list-style-type: none"> <li>o Defined agenda</li> <li>o Disseminate information/consistency</li> </ul> </li> </ul> <p><b>2c.</b> Tracking schedule/Customer oriented (PR)</p> <ul style="list-style-type: none"> <li>o FAQ</li> </ul>
3. Improve customer service & communication	<p><b>3a.</b> Overall Tracker for DSA/OPSC/CDE (PR)</p> <ul style="list-style-type: none"> <li>o Correspondence available to all so status is known across programs</li> </ul> <p><b>3b.</b> Bi-annual agency workshops for constituents (P/PR)</p> <ul style="list-style-type: none"> <li>o Outreach</li> <li>o DSA/OPSC/CDE provide workshops free of charge to NorCal/SoCal</li> </ul> <p><b>3c.</b> Customer advocate/Ombudsman/Liaison (P/PR/L)</p> <ul style="list-style-type: none"> <li>o Legislation if redirection of funds needed</li> </ul> <p><b>3d.</b> Mandatory call back/response (PR)</p> <ul style="list-style-type: none"> <li>o Callback w/i 2 working days</li> <li>o Solution w/i 5 working days</li> <li>o Out of office messages should be set</li> </ul> <p><b>3e.</b> Identify district contact on forms (P)</p>
4. Timing, quality & completeness of submittals/Project ownership	<p><b>4a.</b> Submittal checklist (PR)</p> <p><b>4b.</b> Participation in preliminary collaborative design meetings (P/PR)</p> <p><b>4c.</b> Interdisciplinary communication (P/PR)</p> <ul style="list-style-type: none"> <li>o Collaboration between entities</li> <li>o Quarterly meetings</li> </ul>
5. Unrealistic timeframes/Funding/Ready access	<p><b>5a.</b> Notification of Pending Funding (PR)</p> <ul style="list-style-type: none"> <li>o Tracking System</li> </ul> <p><b>5b.</b> Communication plan (R)</p> <p><b>5c.</b> Establish timeline for managing change order reviews, addenda, ECD's, deferred approvals, field orders, CAPS (PR)</p>
6. Electronic plan check	



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7. Access compliance/No field operation/Stops at plan review

8. Construction process field review/Code interpretation/Final authority

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

**SOLUTIONS TIMELINE**

Short Term (3-12 mos.)	Intermediate (12-36 mos.)	Long Term (36-60 mos.)
1a. Single point of contact 1c. Set schedules & teams		1b. Single agency 1d. Technology solutions/electronic plan check
2a. Training workshops (Annual) 2b. Continuity between regional offices & programs 2c. Tracking schedule/Customer oriented	2a. Training workshops (Annual)	
3b. Bi-annual agency workshops for constituents 3d. Mandatory call back/response 3e. Identify district contact on forms		3a. Consolidated Tracker for OPSC/DSA/CDE 3c. Customer advocate/Ombudsman/Liaison
4a. Submittal checklist 4b. Participation in preliminary collaborative design meetings 4c. Interdisciplinary communication		
5c. Establish timeline for change order reviews, addenda, deferred approvals, field orders, CAPS	5a. Notification of Pending Funding	5b. Communication plan

**RECOMMENDED PERFORMANCE MEASURES:**

	Proposed Solution	Recommended Performance Measure
1a.	Singe Point of Contact/Project Manager	Identify person as single point of contact
1b.	Single Agency	Established single agency
1c.	Set schedules & teams	Established schedules & teams Sample survey of client satisfaction
1d.	Technology solutions o Electronic plan check	Implement project tracking plan o Accuracy o Multi-discipline
2a.	Training Workshops (Annual)	Established annual workshops
2b.	Continuity between regional offices & programs	Customer satisfaction Statewide team exists and has complete checklist of detailed items to manage
2c.	Tracking schedule/Customer oriented	Tracker exists and maintained
3a.	Consolidated Tracker for OPSC/DSA/CDE	Overall Tracker
3b.	Bi-annual agency workshops for constituents	Established workshops
3c.	Customer advocate/Ombudsman/Liaison	Established Liaison
3d.	Mandatory call back/response	District receives callback within 2 days / solution w/i 5 days
3e.	Identify district contact on forms	District contact is on forms
4a.	Submittal checklist	Checklist exists



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<b>4b.</b>	Participation in preliminary collaborative design meetings	Collaborative design meetings take place
<b>4c.</b>	Interdisciplinary communication	Quarterly meetings take place
<b>5a.</b>	Notification of Pending Funding	Tracking system in place
<b>5b.</b>	Communication plan	Communication plan exists
<b>5c.</b>	Establish timeline for change order reviews, addenda, deferred approvals, field orders, CAPS	Timeline

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

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



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