

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

Planning Sub-group Chair:

Carri Matsumoto, Long Beach USD

Planning Sub-group Team Members:

1. Wael Elatar, San Bernardino USD
2. Ben Azarnoush, Contra Costs CCD
3. Chris Ferguson, Department of Finance
4. Fred Yeager, California Department of Education
5. Juan Mireles, Office of Public School Construction
6. Richard Conrad, Division of the State Architect
7. Jim Cerreta, 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 **planning** 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 Planning.

Responsibilities of Participants

1. Attend the meeting scheduled on Thursday, August 5th, 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:

- Implementation of a collaborative process (DSA)
 - Providing "yes"
 - One of the best systems for community colleges
 - Creating win-win situations
 - District is involved from the beginning
 - Start-to-finish continuity
- Consistency of methodology (DSA)
- Adapting to districts' needs, flexibility (CDE)
- After school programs
- Better communication between parents and teachers
- Social development
- Fund leveraging enabled by the program
- Increased outreach and best practices for districts' use
- Increased transparency (OPSC)
 - Intake system
 - Ample opportunities for input and discussion
- Outreach to districts to maximize funding (OPSC)
- District communication and responsiveness to requests
- Opportunities to participate in programs such as High Performance that districts may not otherwise be able to pursue



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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. Addressing eligibility issues	1a. Review and implement a School Facility Program (SFP) eligibility system that truly reflects the needs of schools (modernization and new construction eligibility, portables) 1b. Review and define use of SFP eligibility (classrooms)
2. Disconnect between programming and finance	2a. Review State's role in the process 2b. District-wide, long-term capital plans 2c. Develop training for districts and agencies on process and expectations 2d. Dispute resolution process
3. Expanding role of agencies beyond their charge	No proposed solutions
4. Communication between agencies	4a. Engagement early in the process with appropriate agencies (CDE, OPSC, DSA, DTSC, DIR) 4b. Establish a workshop for understanding rules and regulations (agencies, a concerted effort, at least once per year) 4c. Standardized tracking number across all agencies, one website 4d. One umbrella over all agencies (annual program reviews, streamlining)
5. Regulation Changes	No proposed solutions
6. Budgeting and securing local financing	No proposed solutions
7. Disconnect between agencies and local jurisdictions	No proposed solutions
8. Establishing educational specifications	8a. Develop specifications (by professional consultants, with districts) 8b. Assistance for school districts to develop specifications
9. Re-examine site selection process and standards	No proposed solutions
10. Local school boards understanding their responsibilities and timing	10a. Education (training, communication) 10b. Orientation for school board members (manual, process)

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

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Discussions did not note proposals as legislative (L), regulatory (R), policy (P), procedural (PR), education/training (ED), communication(Com), collaboration (C)

SOLUTIONS TIMELINE

Short Term (3-12 mos.)	Intermediate (12-36 mos.)	Long Term (36-60 mos.)
	1b: Review/define SFP eligibility use	1a: SFP eligibility system for schools' needs
Initial component of 2c: ensure that process is reviewed, defined, and streamlined between agencies	2b: Capital plans 2c: District/agency training 2d: Dispute resolution	2a: Review State's role
4a: Early agency engagement 4b: Workshops	4c: Tracking number, website	4d: Umbrella over agencies



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Initial component of 4d: establishment of annual program reviews		
	8a: Develop specifications 8b: Assistance for district specifications	
10a: School board education	10b: School board orientation	

RECOMMENDED PERFORMANCE MEASURES:

	Proposed Solution	Recommended Performance Measure
1a.	Review and implement a School Facility Program eligibility system that truly reflects the needs of schools (modernization and new construction eligibility, portables)	Review of the eligibility system and an implementation plan
1b.	Review and define use of SFP eligibility (classrooms)	Review conducted, redefinition of SFP eligibility requirements
2a.	Review State's role in the process	Discussion to articulate the State's role
2b.	District-wide, long-term capital plans	Capital plan
2c.	Develop training for districts and agencies on process and expectations	Training model/methodology
2d.	Dispute resolution process	Established dispute resolution process
3.	No proposed solutions	
4a.	Engagement early in the process with appropriate agencies (CDE, OSPC, DSA, DTSC, DIR)	Early involvement by the identified appropriate agencies (CDE, OPSC, DSA, DTSC, DIR)
4b.	Establish a workshop for understanding rules and regulations (agencies, a concerted effort, at least once per year)	Workshops at least once per year
4c.	Standardized tracking number across all agencies, one website	Standardized tracking number and one website
4d.	One umbrella over all agencies (annual program reviews established in the short-term, streamlining)	Constitutional change
5.	No proposed solutions	
6.	No proposed solutions	
7.	No proposed solutions	
8a.	Develop specifications (by professional consultants, with districts)	Specifications
8b.	Assistance for school districts to develop specifications	Specifications
9.	No proposed solutions	
10a.	Education (training, communication)	Educational program in place
10b.	Orientation for school board members (manual, process)	Orientation manual and process

NOTED DISAGREEMENTS OVER TOP 10 PROBLEMS IDENTIFIED OR SOLUTIONS RECOMMENDED:

There was disagreement over whether #7 on the Top 10 Problems/Issues should be "Unfunded mandated regulations" rather than "Disconnect between agencies and local jurisdictions." "Disconnect between agencies and local jurisdictions" was listed because it received the majority vote. The issue of "unfunded mandated regulations" was in regards to costs/fees in the planning and construction of projects sometimes not being considered or addressed as regulations are established.

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Note: Please refer to the written correspondence that modified the issue prioritization process for subsequent sub-groups (letter dated August 6, 2010 from the Planning Sub-Group Chair, Carri Matsumoto, to DGS Chief Deputy Director Stephen Amos, and response letter dated August 10, 2010 from Stephen Amos to Carri Matsumoto). The prioritization rankings for this sub-group were adjusted on August 17, 2010 as requested by Carri Matsumoto for consistency with the revised prioritization process for subsequent sub-groups.



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