

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

Bidding & Construction Sub-group Chair:

Dick Cowan, Davis Reed Construction

Bidding & Construction Sub-group Team Members:

1. Robert Pierce, Elk Grove USD
2. Joe Dixon, Santa Ana USD
3. Mamie Starr, San Joaquin COE
4. Chris Ferguson, Dept. of Finance
5. Fred Yeager, California Department of Education
6. Sue Reese, Office of Public School Construction
7. Chip Smith, Division of the State Architect
8. Diane Branham, 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 **bidding and construction** 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

Responsibilities of Participants

1. Attend the meeting scheduled on Thursday, August 12th, 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:

- Billions of dollars in school buildings, schools are being built
- High quality of school construction
- DSA review provides high level of protection for students, staff, community
- Educationally appropriate facilities because of CDE's interaction with districts
- Rapid fund release through OPSC
- State Fire Marshall approval
- DSA is receptive to problem solving
- Leadership of all agencies wants improvement and streamlining (not rigid)
- OPSC project accounting sheets are accurate and provide great bond accountability
- DSA Advisory Board to gather stakeholder input



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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. Coordination and communication between all parties (understanding of local processes, fund release requirements, accurate data)	1a. Customer school/educational workshop for State agency employees (State-sponsored curriculum, given by practitioners) (P) 1b. Align, streamline, refine agencies' approval processes (map all approval processes) (PR) 1c. Agency school to clarify communication between all parties (PR) 1d. Identify one-on-one problem solvers (P, PR) 1e. Review and examine OPSC regulations and process modifications in a stakeholder forum (PR)
2. One system to manage all processes/soft costs and time too high	2a. Raise the dollar value threshold for agency involvement (\$250,000) (L, R) 2b. Institute DSA small project process (flexibility on PC utilization) (P, PR)
3. Project inspector oversight/fragmentation (DSA Field Inspector and Inspector of Record)	3a. Permit districts to identify one source authority with architect (L) 3b. Design professional has authority to approve/authorize non-structural life safety/accessibility changes without agency involvement (P, PR) 3c. Require publication of field engineer trip notes and project inspector deviations to all parties of construction projects (P, PR) 3d. Definition, publication, and education of the role of the Inspector of Record (P, PR) 3e. Prohibit field engineer from making changes to approved plans (P, PR)
4. Change orders/material scope changes/field change directives	4a. Implement a short-turnaround DSA approval process for change orders (PR) 4b. Define the nature of construction changes that require OPSC and CDE review, and the implications of these changes (milestones) (PR, R)
5. Alternative project delivery regulations	
6. Pre-qualification of bidders and award	
7. 4-306 requirement for DSA approval prior to contracts is limiting	
8. DSA- Construction is a step-child/construction management, document approvals, are slow/data not visible	
9. Prohibition on increments and deferred approvals is problematic	

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

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SOLUTIONS TIMELINE

Short Term (3-12 mos.)	Intermediate (12-36 mos.)	Long Term (36-60 mos.)
<p>1a. Customer school/educational workshop for State agency employees</p> <p>1b. Align, streamline, refine agencies' approval process (may become Intermediate)</p> <p>1e. Review and examine OPSC regulations and process modifications in a stakeholder forum (PR)</p>	<p>1c. Agency school to clarify communication between all parties</p> <p>1d. Identify one-on-one problem solvers</p>	
<p>2b. Institute DSA small project process (may become Intermediate)</p>		<p>2a. Raise the dollar value threshold for agency involvement (\$250,000)</p>
<p>3b. Design professional has authority to approve/authorize non-structural life safety/accessibility changes without agency involvement</p> <p>3c. Require publication of field engineer trip notes and project inspector deviations to all parties of construction projects</p> <p>3d. Definition, publication, and education of the role of the Inspector of Record</p> <p>3e. Prohibit field engineer from making changes to approved plans</p>		<p>3a. Permit districts to identify one source authority with architect</p>
<p>4a. Implement a short-turnaround DSA approval process for change orders</p>	<p>4b. Define the nature of construction changes that require OPSC and CDE review, and the implications of these changes (milestones)</p>	

RECOMMENDED PERFORMANCE MEASURES:

	Proposed Solution	Recommended Performance Measure
1a	Customer school/educational workshop for State agency employees	Curriculum established, workshop conducted, percentage of State agency employees certified
1b	Align, streamline, refine agencies' approval processes	Streamlined processes, projects are processed and approved more quickly, reduction in errors by all parties
1c	Agency school to clarify communication	Agency school established
1d	Identify one-on-one problem solvers	Identified accessible experts for problem resolution
1e	Review and examine OPSC regulations and process modifications in a stakeholder forum	Review of regulations and process modifications conducted, stakeholder forum identified or established
2a	Raise the dollar value threshold for agency involvement	Raised threshold
2b	Institute DSA small project process	Process created, utilization of process, number of projects that are closed out
3a	Permit districts to identify one source authority with architect	Statutory change to permit districts to identify one source authority with architect



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3c	Require publication of field engineer trip notes and project inspector deviations to all parties of construction projects	Publication of the policy
3d	Definition, publication, and education of the role of the Inspector of Record	Policy endorsed by stakeholders
3e	Prohibit field engineer from making changes to approved plans	Decrease in field engineer-initiated change orders
4a	Implement a short-turnaround DSA approval process for change orders	Published procedure, reduced change order approval time
4b	Define the nature of construction changes that require OPSC and CDE review, and the implications of these changes (milestones)	Process flowchart developed, adoption of regulations

NOTED DISAGREEMENTS OVER TOP 10 PROBLEMS IDENTIFIED OR SOLUTIONS RECOMMENDED:

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



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