



# Modernization Planning

Today and Tomorrow

## Study Session

August 16, 2011

OPSC  
DSA  
SAB

### Acronyms

Office of Public School Construction  
Division of the State Architect  
State Allocation Board

# Update

- DSA Approval of Plans
  - Sixty-three (63) sites have been approved
- OPSC Submittal
  - Fifty-eight (58) sites have been submitted to OPSC
- SAB Approval for Unfunded List
  - Twelve (12) Sites have been approved for OPSC unfunded list
  - Approvals for the other forty-six (46) sites submitted are expected at the August through October 2011, SAB meetings

# Update

- OPSC Unfunded List

<u>SCHOOL</u>	<u>PROJECT NUMBER</u>	<u>SAB UNFUNDED APPROVAL DATE</u>	<u>STATE SHARE</u>
Brookhurst Elementary	57/66522-00-009	5/25/2011	\$ 2,161,883.00
Luis Lake Intermediate	57/66522-00-010	5/25/2011	\$ 2,592,346.00
Evans (Ethel M.) Elementary	57/66522-00-011	5/25/2011	\$ 2,829,024.00
Ralston (Dr. Walter C.) Intermediate	57/66522-00-012	5/25/2011	\$ 4,431,351.00
Gilbert Elementary	57/66522-00-013	5/25/2011	\$ 1,953,470.00
Stanford Elementary	57/66522-00-014	7/12/2011	\$ 3,329,288.00
Warren (Earl) Elementary	57/66522-00-015	7/12/2011	\$ 3,131,194.00
Woodbury Elementary	57/66522-00-016	7/12/2011	\$ 3,445,228.00
Garden Park Elementary	57/66522-00-017	7/12/2011	\$ 1,174,940.00
Walton (Izaak) Intermediate	57/66522-00-018	7/12/2011	\$ 4,071,697.00
Skylark Elementary	57/66522-00-019	7/12/2011	\$ 2,296,383.00
Garden Grove High	57/66522-00-020	7/12/2011	\$17,203,671.00
Total			\$48,620,475.00

# Update

## • Upcoming Approvals

### OPSC PROJECTS IN PROCESS

<u>SCHOOL</u>	<u>PROJECT NUMBER</u>	<u>ESTIMATED SAB UNFUNDED APPROVAL DATE</u>	<u>ESTIMATED STATE SHARE</u>
Cook (A. J.) Elementary	57/66522-00-021	8/24/2011	\$ 1,634,268.00
McGarvin (Sarah) Intermediate	57/66522-00-022	8/24/2011	\$ 2,897,489.00
Jordan (Donald S.) Intermediat	57/66522-00-023	8/24/2011	\$ 2,817,838.00
Wakeham Elementary	57/66522-00-024	8/24/2011	\$ 2,454,191.00
Lawrence (Ernest O.) Elementar	57/66522-00-025	8/24/2011	\$ 3,211,902.00
Crosby (Genevieve M.) Elementa	57/66522-00-026	8/24/2011	\$ 2,919,094.00
Riverdale Elementary	57/66522-00-027	8/24/2011	\$ 3,302,299.00
Faylane Elementary	57/66522-00-028	8/24/2011	\$ 3,187,115.00
Bell (Hilton D.) Intermediate	57/66522-00-029	8/24/2011	\$ 3,399,255.00
Newhope Elementary	57/66522-00-030	8/24/2011	\$ 3,771,696.00
Northcutt (Mamie L.) Elementar	57/66522-00-031	8/24/2011	\$ 1,774,942.00
Carrillo (Leo) Elementary	57/66522-00-032	9/22/2011	\$ 1,612,100.00
Bryant Elementary	57/66522-00-033	9/22/2011	\$ 2,948,106.00
Parkview Elementary	57/66522-00-034	9/22/2011	\$ 3,726,261.00
Alamitos Intermediate	57/66522-00-035	9/22/2011	\$ 6,571,877.00
Russell (Edward) Elementary	57/66522-00-036	9/22/2011	\$ 3,321,138.00
Paine (Thomas) Elementary	57/66522-00-037	9/22/2011	\$ 1,833,513.30
Hill (Merton E.) Elementary	57/66522-00-038	9/22/2011	\$ 2,403,670.83
Simmons (Linton T.) Elementary	57/66522-00-039	9/22/2011	\$ 2,183,995.52
Mitchell Elementary	57/66522-00-040	9/22/2011	\$ 2,570,953.13
Clinton ES	57/66522-00-041	10/27/2011	\$ 3,618,988.43
Carver ES	57/66522-00-042	10/27/2011	\$ 1,644,812.15
Fitz IS	57/66522-00-043	10/27/2011	\$ 3,113,260.49
Hazard ES	57/66522-00-044	10/27/2011	\$ 3,386,392.80

- continued -

# Update

## • Upcoming Approvals

### OPSC PROJECTS IN PROCESS (cont.)

<u>SCHOOL</u>	<u>PROJECT NUMBER</u>	<u>ESTIMATED SAB UNFUNDED APPROVAL DATE</u>	<u>ESTIMATED STATE SHARE</u>	
Excelsior ES	57/66522-00-045	10/27/2011	\$ 2,378,964.22	
Eisenhower ES	57/66522-00-046	10/27/2011	\$ 2,742,743.74	
Irvine IS	57/66522-00-047	10/27/2011	\$ 4,751,023.32	
Morningside ES	57/66522-00-048	10/27/2011	\$ 3,220,292.94	
Pacifica HS	57/66522-00-049	10/27/2011	\$ 9,585,878.34	
Bolsa Grande HS	57/66522-00-050	10/27/2011	\$ 14,097,377.22	
Santiago HS	57/66522-00-051	10/27/2011	\$ 14,456,437.28	
Barker ES	57/66522-00-052	10/27/2011	\$ 1,468,955.10	
Sunnyside ES	57/66522-00-053	10/27/2011	\$ 1,560,954.70	
Los Amigos HS	57/66522-00-054	10/27/2011	\$ 10,137,873.88	
Heritage ES	57/66522-00-055	10/27/2011	\$ 2,219,893.08	
Allen ES	57/66522-00-056	10/27/2011	\$ 1,594,048.60	
La Quinta	57/66522-00-057	10/27/2011	\$ 10,481,751.74	
Monroe ES	57/66522-00-058	10/27/2011	\$ 1,679,334.66	
Enders	57/66522-00-059	10/27/2011	\$ 3,973,780.00	
Zeyen ES	57/66522-00-060	10/27/2011	\$ 2,694,430.56	
Anthony ES	57/66522-00-061	10/27/2011	\$ 2,137,954.52	
Stanley ES	57/66522-00-062	10/27/2011	\$ 1,861,338.75	
Rosita ES	57/66522-00-063	10/27/2011	\$ 3,085,020.98	
Doig IS	57/66522-00-064	10/27/2011	\$ 2,450,172.24	
Murdy ES	57/66522-00-065	10/27/2011	\$ 1,814,141.06	
Marshall ES	57/66522-00-066	10/27/2011	\$ 1,837,087.40	
<b>ESTIMATED SUBTOTAL</b>			<b>\$ 170,534,611.98</b>	*
<b>GRAND TOTAL (includes OPSC Projects In Progress and Unfunded List)</b>			<b>\$ 219,155,086.98</b>	*

\* Estimated Minimum

# Today

- Preparation of approved plans for bidding process
  - Architects review of contract documents
    - Drawings
    - Project Manual / Specifications
    - Bidding Documents
    - Scope
    - Quality Control
    - Construct-ability
  - Legal Counsel review of contract documents

# Today

- **Logistics Planning and Development**

## Purpose and Goal

**Purpose:** Review the logistics for modernization in order to gain additional input/insight to district and site specific needs from Instruction and other district departments.

**Goal:** Accomplish a program that assures students and instruction are **TOP PRIORITY** while undergoing an efficient and cost effective modernization program.

Some general considerations are:

- Eliminate/minimize the effect on instructional program
- Student and staff safety
- Testing Timeframes
- Separation of contractors and students/staff

Some specific considerations are:

- Site size and available rooms
- Common areas and buildings
- Programs at the site
- Location and transportation
- Community needs

# Today

- **Logistics Planning and Development**

Various delivery methods examined

Traditional Design Bid Build – General Contractor

Construction Manager – Multi Prime

Lease – Lease-back

District teams

Combination of various delivery methods

Based on site specifics

Availability for relocation within site

Availability for relocation off-site

Interim housing

Size of scope/phase

What to expect at each site

Period of time when utilities are shut down

Old utilities replaced (large equipment trenching occurs)

No utilities

School is not in session (summer or vacant)

Period of time when classrooms or “Wings” are vacated/unoccupied

Interior work occurs

Testing timeframe considerations

# Today

- **Logistics Planning and Development**

## Options of relocation considered

- Utilize summer to full extent

- Utility work

- Common buildings/areas

- Use of potential empty classrooms at each site

- Interim housing (relocatable buildings) (High Schools & large sites)

- Join smaller sites and perform work at each site for each year (2 years total)

## Order of projects

- Order approved by State

- Site specific needs

- Input from principals and other district staff

## Potential for sites to be grouped together for bidding

- Depending on bids received

- Number of projects at a time

- Group into different site packages

- Encourages more bidding

# Tomorrow

- **Logistics Planning and Development**
  - Strategy for each site
    - Potential relocation based upon:
      - Scope
      - Size
      - Available space
      - Programs at the site
    - Interim housing needs assessed
  - Desired schedules
    - Students and their success FIRST
    - Economy of bidding
    - Manageability

# Tomorrow

- **Bidding Preparation**
  - Standardization of items requiring consistency as a district standard
    - Board approval
- **Project / Construction Management**
  - RFQ / RFP process
  - Timing as funding is allocated from OPSC
  - Various competitive managers
  - Unit pricing

# Tomorrow

- Constructability review by bid team
- Development and review of proposed site specific schedules with Instruction and other district departments
- Interim housing
  - Entire school
  - Designated wings/ buildings
  - Larger sites
- Phasing considered at larger and designated sites
- Cash-Flow coordination
- Bidding (Purchasing department)

# Public Works and Bidder Prequalification

- **Civil Code section 3100**
  - **Public works** defined as, “... Any work of improvement contracted for by a public entity.”
  - All of the construction work associated with Measure A and Modernization will be public works
- **Public Contract Code sections 20111 and 20651**
  - Public works projects and construction services have a bid limit of \$15,000

# Public Works and Bidder Prequalification

- **Prequalification of bidders**
  - Done for all prospective bidders by completing a questionnaire regarding background, experience, financial ability and references in performing public works projects, including a certificate of accountant.
  - Respondents will be scored based upon their responses and other factors which will determine their qualification status to bid on our contracts.

# Formal Competitive Bidding Procedures

- Public contract Code Section 20111(a)
  - Formal bids are required for most contracts over \$50,000 , and may be the best method where needs are finite and identifiable.
- Public contract Code Section 20111(d)
  - Current limit is \$78,900 based on most recent adjustment.
- Advertising for Bids
- Preparing Bid Packets should always include
  - Bid Specifications
  - General terms and conditions for doing business with the District
  - Any special terms and conditions
  - Bonding requirements, bid sureties when required

# Formal Competitive Bidding Procedures

- Send bid packets to potential bidders
- Optional job walk or pre-bid meeting
- Bid opening
- Bid tabulation
- Evaluation of bids
- Recommendation for board approval of award
- Award of bid