

Managing a Capital Improvement Program?



Introductions

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Executive Director of Operations
Oak Park and River Forest High School District 200



Oak Park and River Forest
High School

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CBRE



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CBRE



Bond Planning and Assessment

COMMITTEES

Establish and engage committees as designated by the bond planning team to assess needs and disseminate information.

FACILITY/NEEDS ASSESSMENT

Formal evaluation of existing facilities to determine current conditions and needs, including FCAs, maintenance documentation and schedules, and interviews with staff, administration, and committees.

DEMOGRAPHICS

Commission and/or review demographics to determine or review growth patterns and facility needs.

COMMUNITY INPUT

Engage community through committees, town hall meetings, community surveys or other methods as determined by the District to establish baseline community expectations, wants, and needs.

PRELIMINARY PROGRAM & BUDGET

Develop preliminary program and budget based on findings during assessment and development stage

Bond Package Development

CFO REVIEW

Engage CFO to review overall findings and to determine and confirm feasibility, sequencing, bond structure, and tranches.

FINANCIAL ADVISOR, BOND COUNSEL, ELECTION ATTORNEY ENGAGEMENT

Engage school and election attorneys, bond counsel, financial advisor, underwriters to ensure timelines and requirements are met.

FINAL REVIEW

Present all findings to Bond Committee(s), Administration and Board of Trustees for final edits and review.

BOND ISSUE AMOUNT & LANGUAGE

Strategically develop proposition language including descriptions of projects included in the bond proposal consistent with publicized needs

BOARD COMMUNICATION & APPROVAL

Conduct workshops with Board of Trustees providing complete Master Plan and identified Bond Propositions, as well as election strategy.

Election Strategy

ETHICS REVIEW

Conduct Bond Ethics review and Bond Election Ethics Training, as necessary.

VOTER ENGAGEMENT

Develop campaign strategy and communications plan for citizens including website development, voter registration campaigns, social media development and monitoring, email/text campaigns, Early Voting Locations, and outdoor signage. May work with citizens to form a Political Action Committee (PAC) to promote public awareness.

VOTER ANALYTICS

Conduct analysis to determine passability of bond and develop strategies to overcome issues.

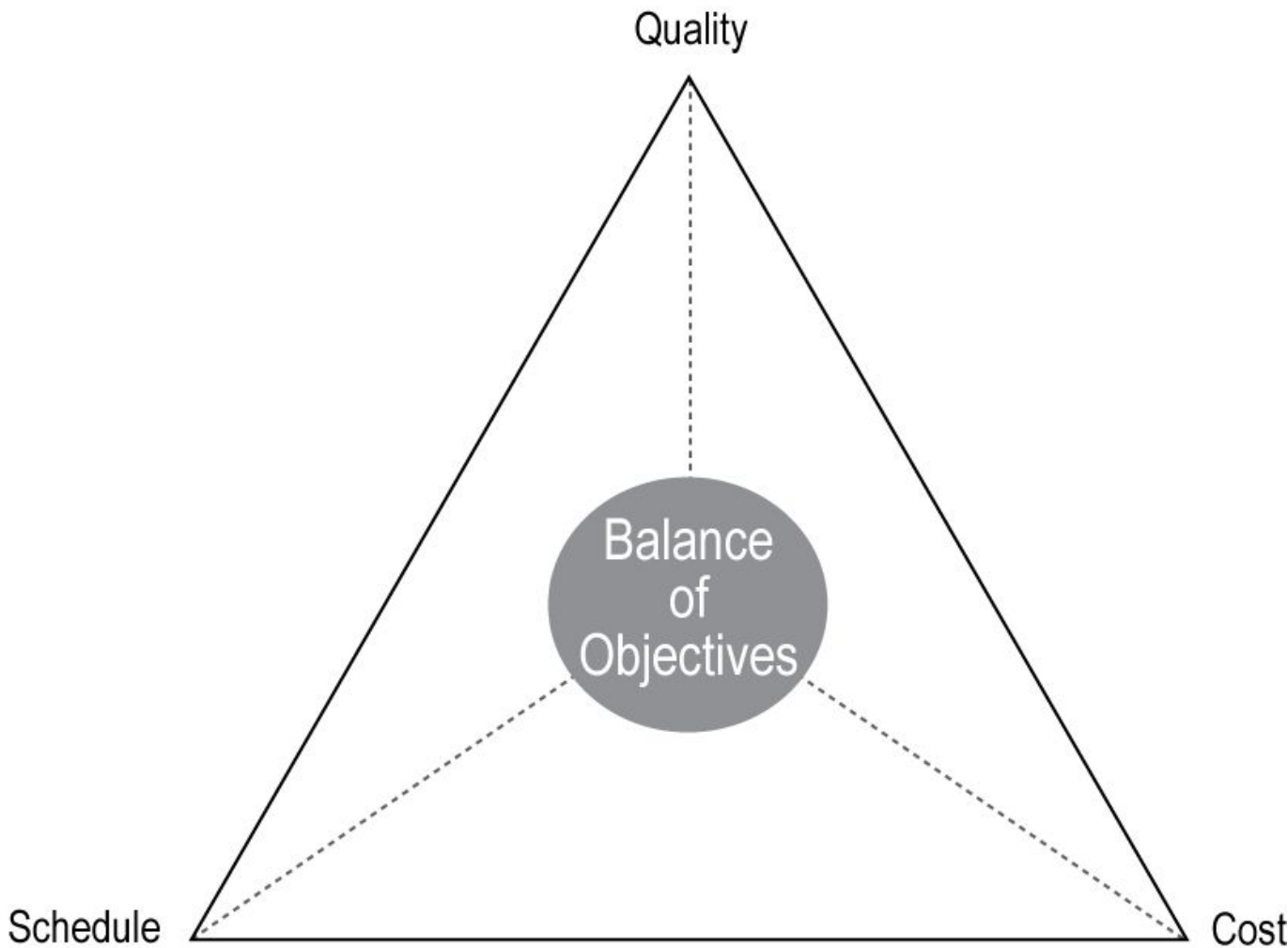
CALL FOR ELECTION

Work with Board of Trustees and Administration to ensure timely call for bond election and communication with Elections Administration.

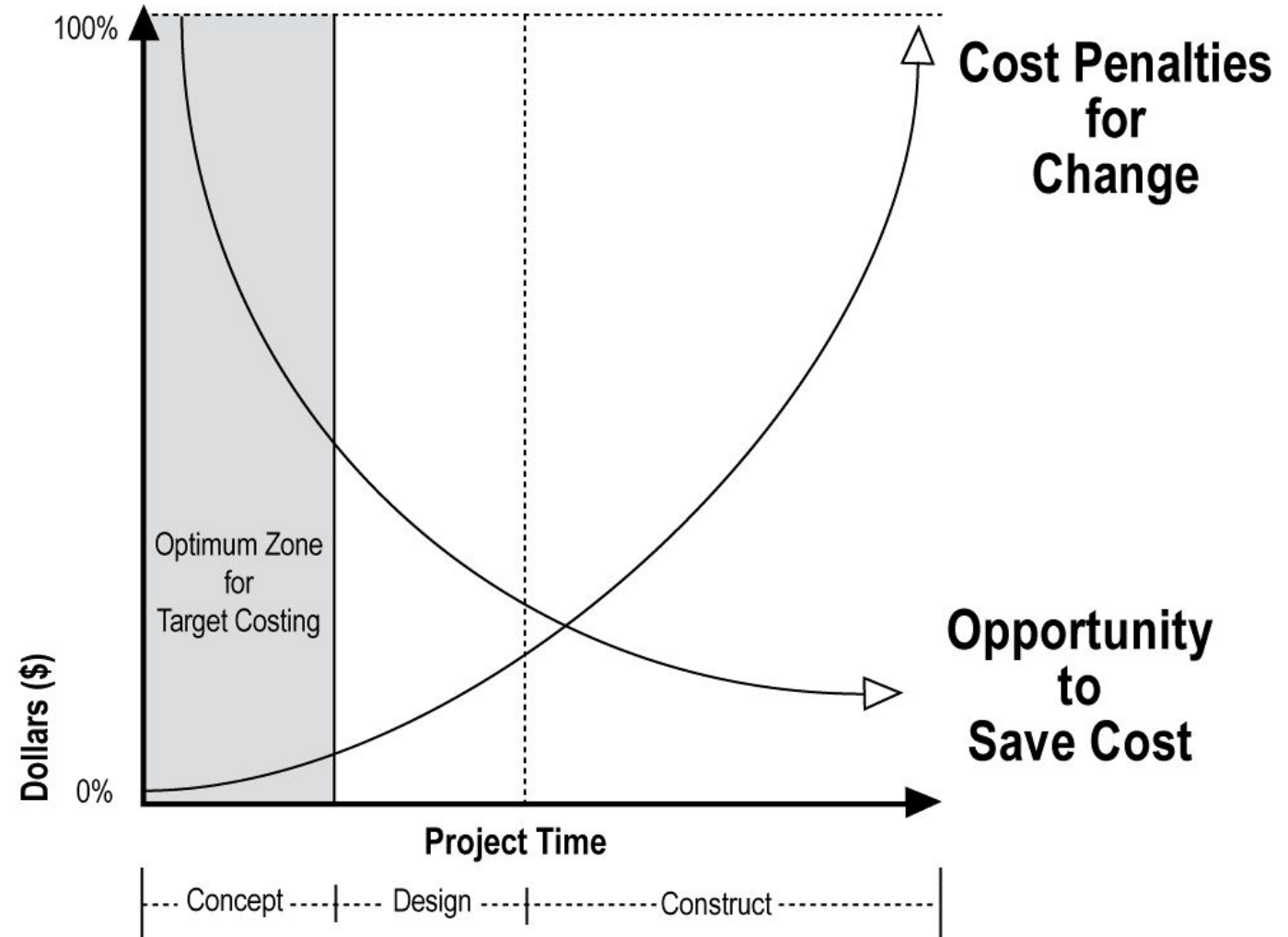
Bond Timeline



Project Delivery Objectives



Project Cost Performance



Project Delivery Methods

- Design Bid Build
- Construction Management – At Risk
- Construction Management – As Advisor
- Design Build



Project Delivery Methods - Design Bid Build

Pros:

- Least risk overall
- Most transparent
- Industry Accepted Delivery Method
- Competitive bidding
- Limited risk due to financial commitment
- Owner/Architect Relationship
- Subcontractor approval

Cons:

- Contractor not involved in design
- Low bid/quality issues (mitigated by prequalification)
- Owner must arbitrate between A/E and GC
- Risk for change after bidding



Project Delivery Methods - Construction Management At Risk

Pros:

- More professional relationship with contractor
- Early cost and schedule information
- Preconstruction services (i.e. construction logistics)
- More control of subcontractors
- Construction input in design
- Faster project delivery is possible

Cons:

- Total cost unknown until GMP
- Multiple bid packages
- Higher risk to Owner
- Increased staff support



Project Delivery Methods - Construction Management As Advisor

Pros:

- Professional advisor as CM
- Earlier cost information during design
- Direct contract with subcontractors
- Advisor always has best interests of owner and more potential savings

Cons:

- Subcontracts held by owner
- Multiple packages higher risk to owner
- Increased coordination by owner



Project Delivery Methods - Design Build

Pros:

- Single point of responsibility
- A/E and Contractor provide unified recommendations
- Preconstruction services (i.e. construction logistics)
- Potentially faster delivery system
- No design liability

Cons:

- Unique design process
- Legislative requirements for procurement
- Fewer experienced architects and contractors
- Needs better performance specification up front
- Limited design flexibility



The Process



Pre-Construction

- Open Communication
- Processes
- Design Reviews



Construction

- Quality Control
- Documentation
- Change Management



Post-Construction

- Staff Training
- Warranty Process
- Financial Closeout

Pre-Construction



Open Communication

The more you know and AGREE to up front, the easier Acceptance will be by all Departments.

Setting expectations early and communicating those to the A/E and Contractor will limit surprises later.



Establish Processes

Setting roles & responsibilities and guidelines for decision making (AND DOCUMENTING THEM) will lead to better consensus on the main priorities.



Design Reviews

Campus

Administration

- Learning Areas
- Supervision
- Sightlines
- Indoor Pathways
- Adjacencies
- Pick up / Drop off
- Storage

Maintenance

- Access to Equipment
- Protection of Equipment
- Storage

Technology

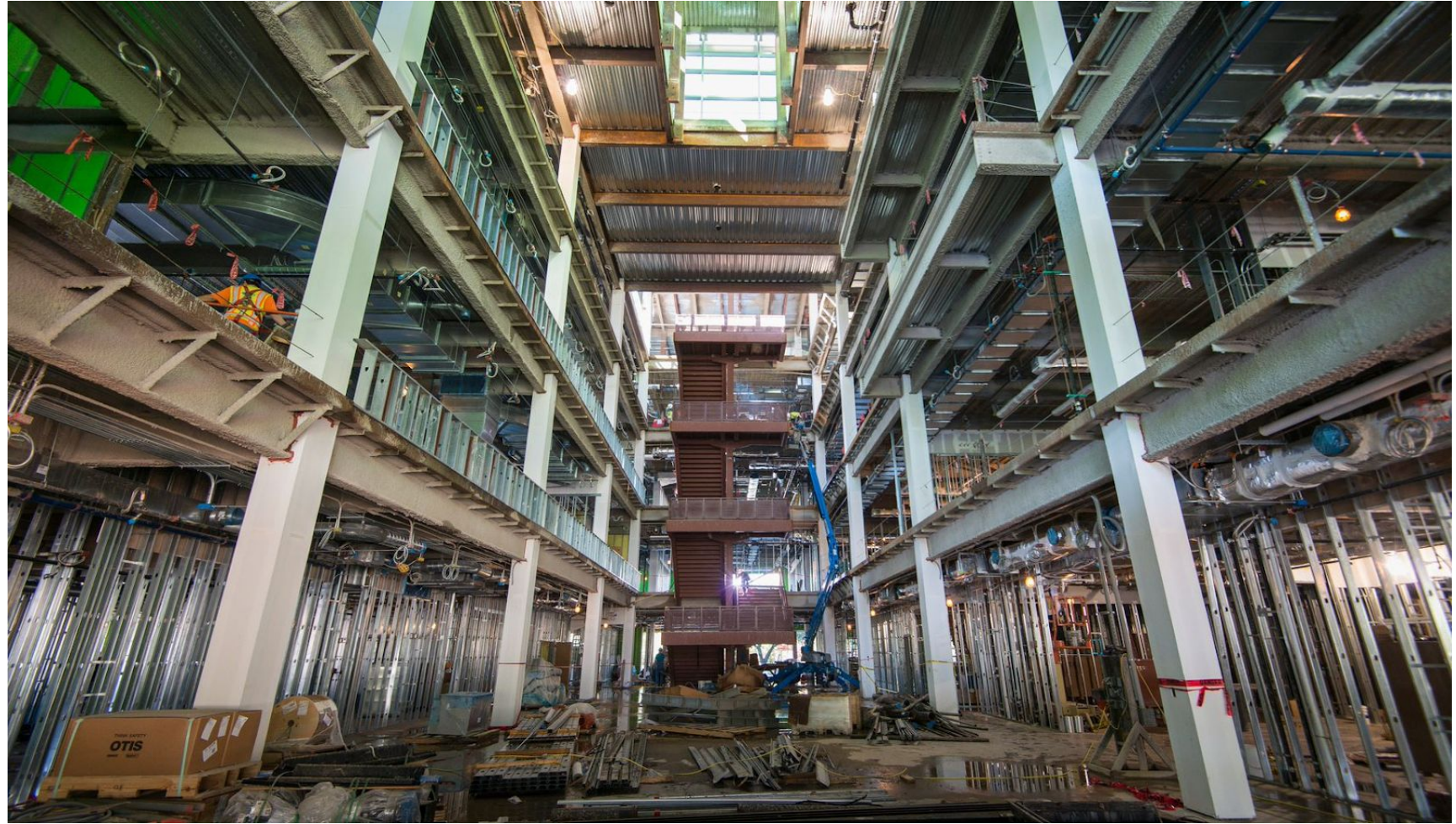
- MDF/IDF Layouts
- A/V Systems
- Teaching Stations
- Cabling Pathways

Safety & Security

- Ingress / Egress
- Access Control
- CCTV
- Signage



Construction



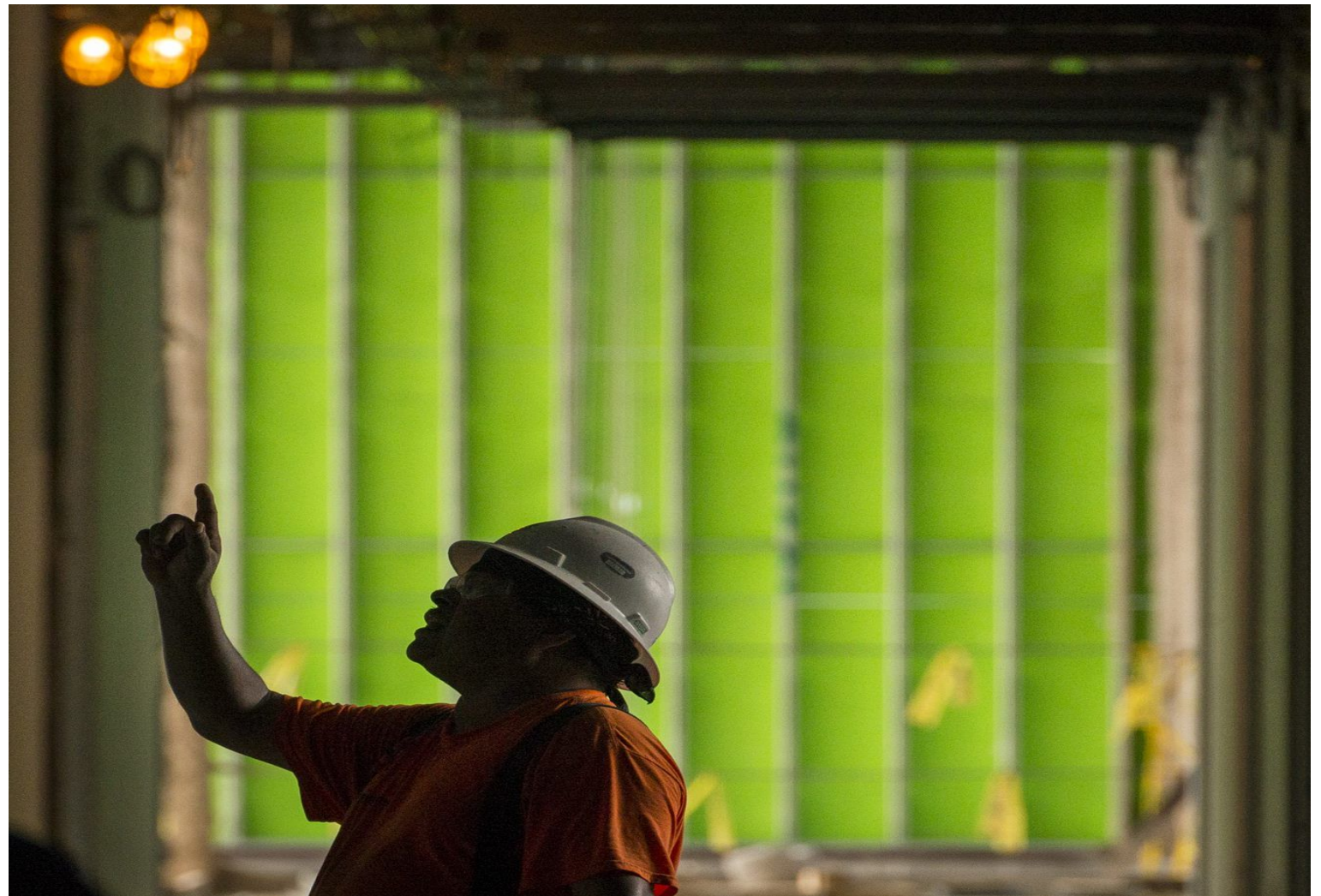
Quality Control

Consultants

- Materials Testing
- Building Envelope
- Test & Balance
- Commissioning
- Technology

Inspections

- AHJ
- Internal Departments
- End Users



Documentation

Document Control

- File Sharing
- Retention
- Follow Up



Change Management

- Communicate
- Control
- Update Documents



2022 ANNUAL
CONFERENCE

 #iasboAC22

STRONGER TOGETHER. SMARTER TOGETHER.

Post-Construction



“Project closeout is my favorite phase of construction.”

Said nobody.....at any point in the history of time.....ever.



Who needs to be included?

Acceptance



- Risk Management
- Energy Management
- Maintenance
- Technology
- Nutrition Services
- Safety & Security

Occupancy



- Communications
- Campus Administration
- Health & Safety
- Transportation
- Police / SRO

Closeout



- Communications
- Campus Administration
- Health & Safety
- Transportation
- Police / SRO

- Property Insurance – No gap after Builder's Risk Stops
- Building & Contents should be covered

- Test & Activate Network – Setup IP Addresses
- Backup systems in place

- Setup Utility Accounts – Take over responsibility
- Program BAS to District Schedule
- Documentation for potential rebates

- Health Operating Permits
- Food Deliveries

- Commissioning of Systems
- Preventative Maintenance Schedules
- Accept Extended Warranties
- Operating Permits (Elevator / Boiler)

- Programming & Monitoring

Final Printed Document

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HSD FACILITIES SERVICES | SECURITY MAINTENANCE

Life Safety Systems

PROJECT TURNOVER CHECKLIST

To ensure timeliness and efficiency and to avoid project delays, the following should be completed and verified by Construction Services prior to contacting Security Maintenance.
Send completed and signed form to: securitymaintenance@houston.gov

CAMPUS:

DATE:

CARD ACCESS

VENDOR:

Shop drawings and programming sheet submitted to Security Maintenance ☐

Panel and power supply are powered up ☐

Cables are terminated at the control panel ☐

Installation of Alphacon controller, master stations in the following locations: ☐

Principal's office ☐

Administrative Assistant's office ☐

Reception area ☐

Release buttons for store front main doors ☐

Equipment installed at each door with card access: ☐

Request to exit sensor ☐

Door contacts ☐

Door repair ☐

Doors strikes or electrified hardware ☐

Alphacon door stations: ☐

Front entry door ☐

Rear entry door ☐

BURGLAR ALARM

VENDOR:

Shop drawings and zoning forms submitted to Security Maintenance ☐

Panel and power supply powered up ☐

Cables terminated at the control panel ☐

Keypads installed in the following areas: ☐

BCR room ☐

Main Office ☐

Kitchen rear entry ☐

Pools ☐

Band Room ☐

Boys/Girls locker rooms ☐

Coach's office ☐

Motion sensors all mounted ☐

Pins for expanders installed ☐

Proper cabling: 4 conductor 18ga for EZM and Keypads ☐

4 conductor 22ga for motion detectors ☐

Key pad circuit installed from main panel to keypad device with 18ga plenum wire ☐

Key pad home run 184c cabling back to main control panel (daisy chain not allowed) ☐

New and Renovated Campus Turnover Checklist

Page 1

Occupancy

Communications

- Press Releases / Social Media
- Notice to Parents
- Dedication / Ribbon Cutting

Campus

Administration

- Align Programs with Facilities
- First Day Processes
- Interior Pathways

Health & Safety

- AEDs / Bleed Kits

Transportation

- Bus Routes
- Pick-up / Drop Off
- Timing with Adjacent Campuses

Police / SRO

- Evacuation Procedures
- Lockdown Drills
- Drive / Door Numbering



Closeout

Operations

- O&M Binders
- As-Built Drawings
- Attic Stock
- Baseline Studies

Finance

- Reconciliation of Contracts
- Final Invoices
- Final Review of open PO's

Legal / Audit

- Releases & Affidavits
- Internal Review



Closeout & Warranty

Staff Training

- Campus Administration and Staff
- Operations Team
- Maintenance Staff

Warranty

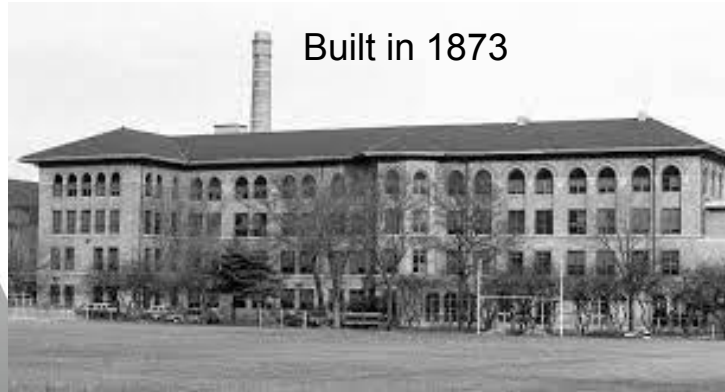
- Have a process
- Delineate from wishes
- Follow up

Financial Closeout

- Reconcile Allowances
- Confirm final invoices
- Close open PO's



Oak Park and River Forest High School



Built in 1873



Oak Park and River Forest High School – Facilities Master Plan

- **Annual Equipment and Furniture Replacement**
- **10-Year Maintenance Plan**: The capital improvements that put our building into better-operating condition. The plan includes preventive and deferred maintenance, items from the Accessibility Audit and other ADA-compliant projects, and Health/Life Safety items, which must be done to comply with current health and safety codes.
- **Long-Term Capital Projects/Imagine OPRF**: Significant changes and upgrades to the building that improve the way we serve student needs.





Oak Park and River Forest High School Facilities Master Plan: Imagine OPRF Components

In its November 2018 recommendations to the Board of Education, the Imagine OPRF Work Group presented a comprehensive facilities plan to be done in five projects over roughly 10 years.

Execution of projects depends on separate Board approval for each one; currently Project 1 is the only one approved and underway.

Costs for projects that are five years or more years in the future are difficult to project with any accuracy and therefore are not included here.

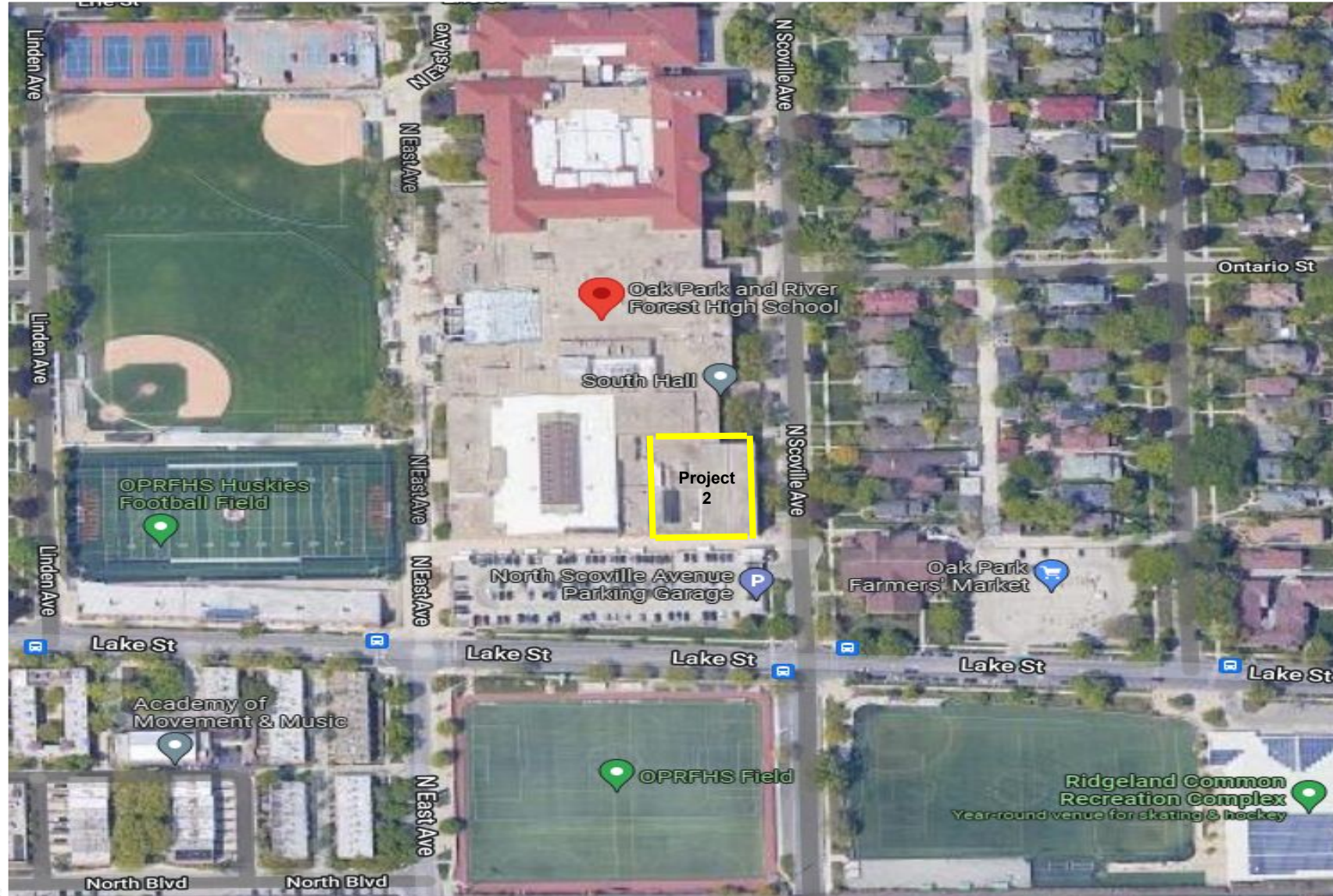
PROJECT 1 \$38,782,380 <i>Full completion: August 2023</i>	PROJECT 2 \$65,367,600*	PROJECT 3	PROJECT 4	PROJECT 5
<p>Completed:</p> <ul style="list-style-type: none"> Addition of two-story Student Resource Center Renovation of Main Entrance and Welcome Center Renovation of Student Activities Center, now called Student Commons Renovation and addition of Special Education offices and conference rooms Relocation/renovation of Driver Education classrooms Relocation/renovation of mailroom and duplicating New ADA-compliant elevator Renovation of freight elevator to be ADA-compliant <p>In Progress:</p> <ul style="list-style-type: none"> Renovation of 65 classrooms, including special education TEAM classrooms Addition of 15 new classrooms in former Library and Tutoring Center 	<p>This project has not been approved by the Board of Education. At the time it approved Project 1, the Board directed district administrators to propose a Project 2 funding plan that includes private fundraising.</p> <ul style="list-style-type: none"> SE Physical Education Addition Field House Extension, Flooring & Mechanical Upgrades <i>Recommended only if the SE Physical Education Addition is not planned to be executed within 10 years; it is not included in cost above.</i> <p><i>*Cost estimated in 2018 based on high-level conceptual design</i></p>	<ul style="list-style-type: none"> SW Performing Arts & Physical Education Addition Green Roof over SW Addition <i>Alternatively, explore solar panels.</i> 	<ul style="list-style-type: none"> Administration Offices Student Services Classrooms (4) Science Labs (3) Science Labs (12) Science Labs (12) Huskie Pups (Phase 2) CTE & Drivers' Ed Special Education Learning Development/Emotional Development & Fourth Floor Classrooms (6) Kitchen & North Cafeteria Theatre Lighting Classrooms (5) Tennis Courts 	<ul style="list-style-type: none"> Commons – Phase 2 & Classrooms (12) Classrooms (7) Comp Gym, Field House & Classrooms (6) PE Shell Space Solar Panels over E2 Addition Family and Consumer Science Labs (4) & Fourth Floor Classrooms (6) Art Labs Mechanical Classrooms (7) South Fields Storage & Bleachers West Fields Synthetic Turf

Oak Park and River Forest High School – Project 1

MBE/WBE Inclusion Plan

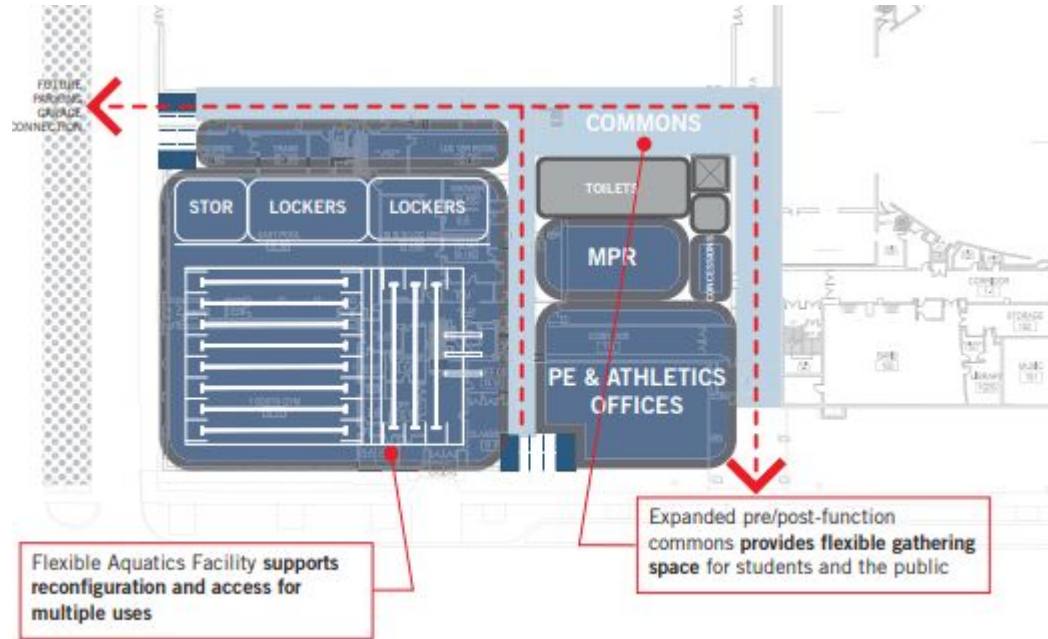


Oak Park and River Forest High School – Project 2

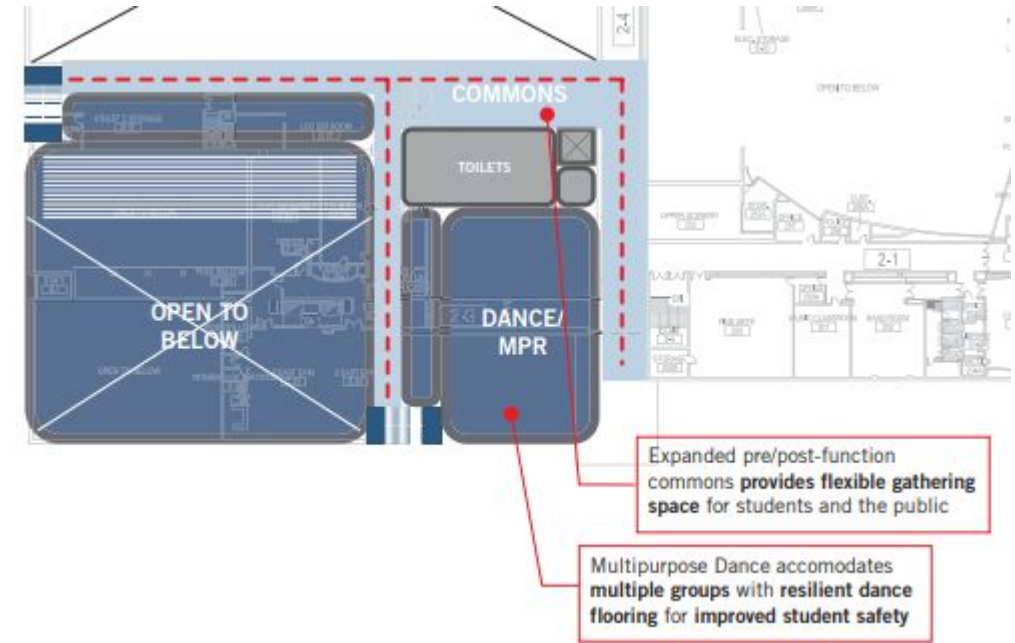


Oak Park and River Forest High School –Project 2

1st Floor

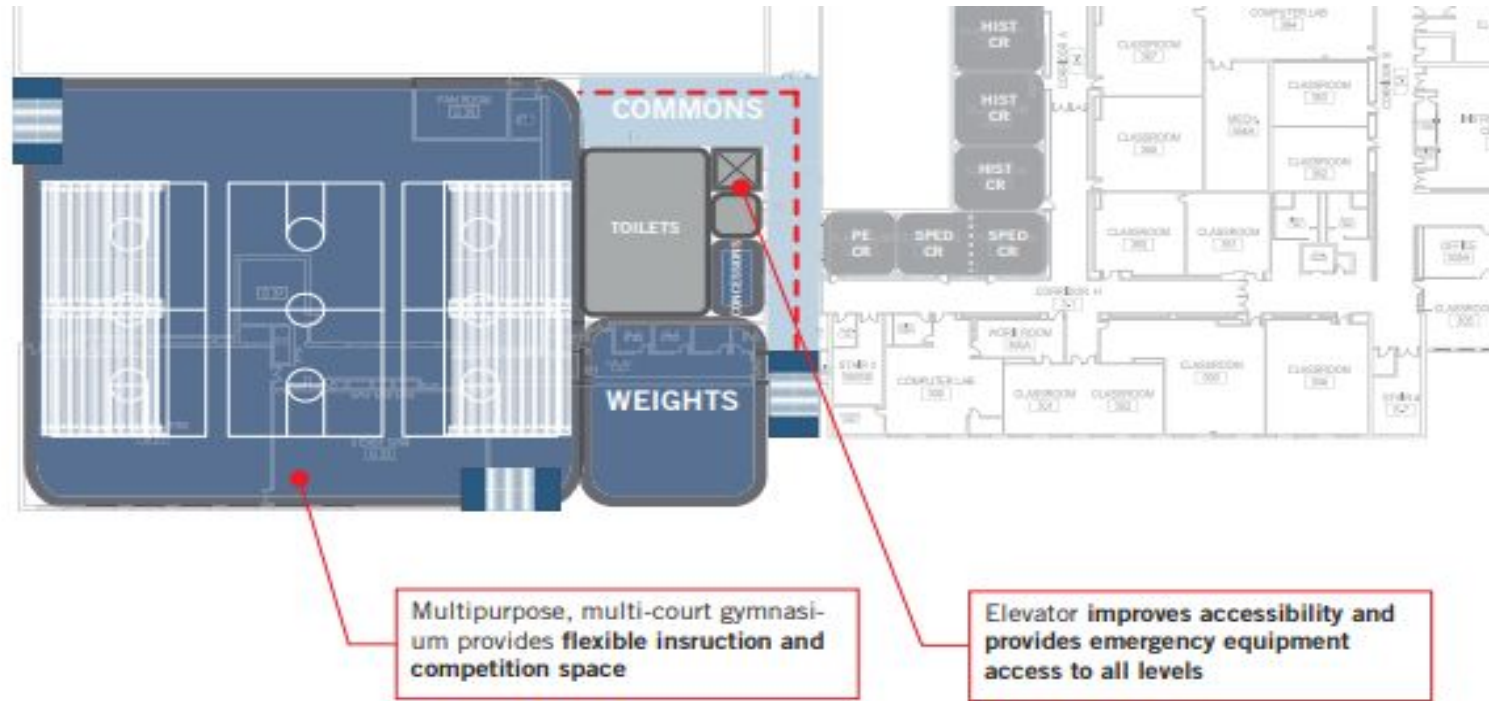


2nd Floor

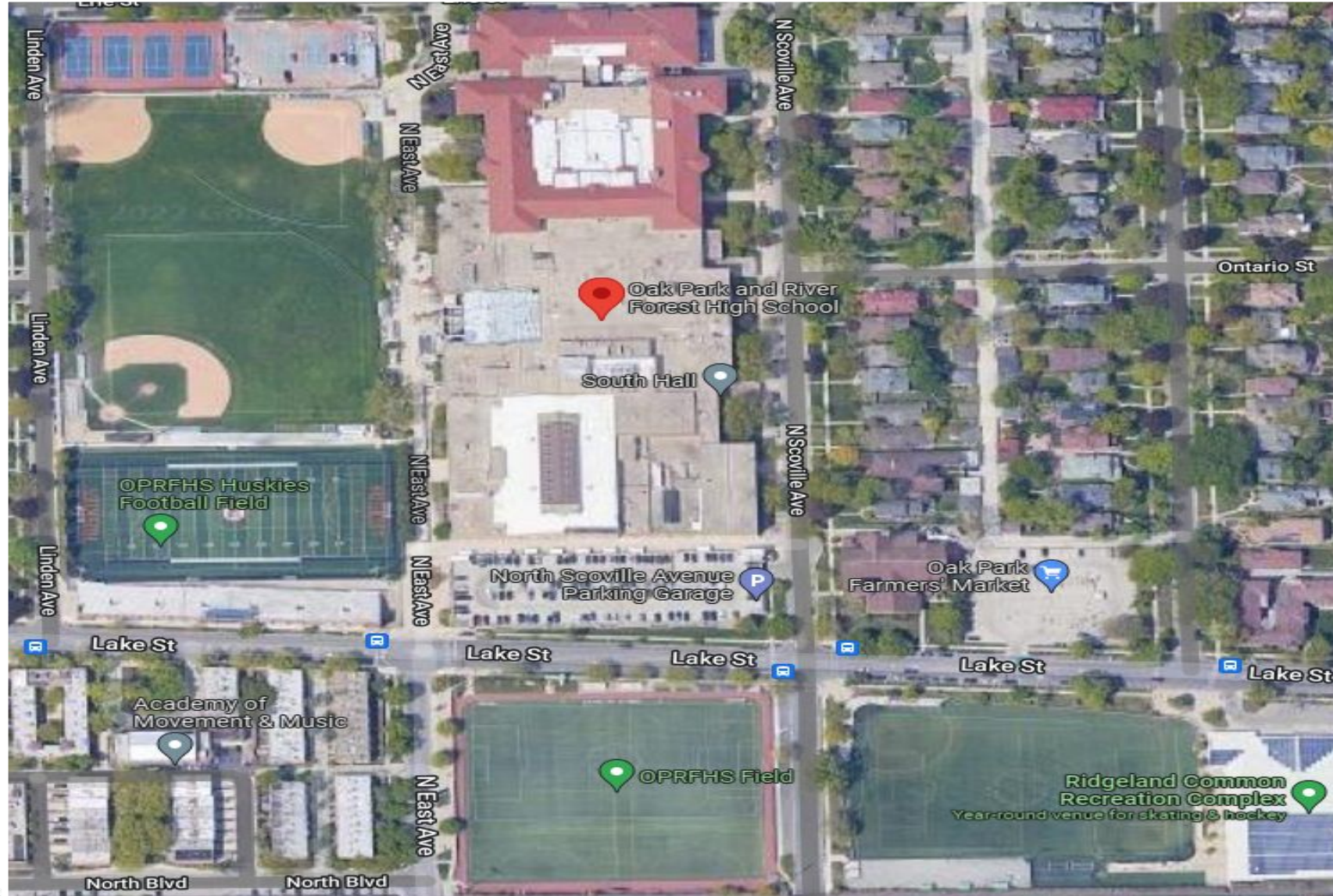


Oak Park and River Forest High School –Project 2

3rd Floor



Oak Park and River Forest High School – Fields Renovation



Oak Park and River Forest High School – Fields Renovation

Current *DRAFT* Concept...

By the Fall of 2023, have the following in place:

1. 400M track (with competitive field) on the back fields between tennis courts and stadium
2. Upgraded Ridgeland Common for softball programs
3. Multi-sport turf field on Lake Street (to be used in spring for varsity baseball)



Oak Park and River Forest High School – Fields Renovations

Date and Events

- April 6 Booster Club meeting
- April 7 MOA to formalize collaboration goes to PDOP Board for discussion
- April 12 Facilities Committee Meeting
- April 13 Conversation/feedback session with OPRFHS neighbors
- April 14 Same MOA, along with draft plans for field renovation, goes to D200 Board for discussion
- April 21 MOA is voted on by PDOP Board
- April 28 MOA is voted on by D200 Board
- May 4 Joint PDOP/D200 public meeting to gather community feedback
- May/June Present final draft & IGA between PDOP and D200 to D200 Board for review/discussion
- May/June Final plans and formal IGA between PDOP and D200 presented to D200 Board for approval

Questions and Answers



We thank you for your time!

Presenters:

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