



Construction Update

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Capital Projects

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We passed a bond. What happens next?



Let's go through the process ...



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Steps in School Construction

- **Planning**
 - Finance (passing a bond)
 - Study & Survey (D-1)
- **Pre Design Analysis**
 - Architect and Consultants
 - Project Application (D-3)
 - Educational Specifications (D-5)
- **Preparing for Construction**
 - Design Process (D-7)
 - Bid Evaluation (D-9)
 - Contract Award
- **Construction**
 - Construction
 - Final Completion and Acceptance (D-11)
- **Post Construction**
 - Occupancy
 - Asset Preservation



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Planning

Finance

- Proposed projects and bond package developed by Bond Planning Committee composed of District staff and community members
- Preliminary budget estimates developed by architectural consultants working with the Bond Planning Committee
- Bonding capacity

Study and Survey (D-1)

- Tells OSPI the needs identified and projects proposed as defined by Bond Planning Committee
- Board Acceptance of Study & Survey



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Pre Design Analysis

Architect and consultants

- Process defined by law (RCW 39.80)
 - Request for Qualifications
 - Evaluate
 - Interview
 - Selection
- Contract with Architect (Fee schedule per WAC 392-343-070)
 - Basic services: architectural, structural, mechanical, electrical
 - Additional services: landscape, acoustical, kitchen consultants, construction contract administration
 - Change orders: required to meet unexpected situations such as unforeseen site conditions and owner-directed or agency required modified project requirements



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Pre Design Analysis

Project Application (D-3)

- Seeks project approval from OSPI for state assistance for new construction and/or modernization
 - Name of Project
 - Type of project (new-unhoused, new/addition, modernization, new in lieu of modernization)
 - Estimate of project costs, bid date, and source of funds for project (*project estimates are refined and updated with each subsequent D-form application*)

Educational Specifications (D-5) (per WAC 392-343-065)

- Defines and communicates District's goals and programmatic requirements for the project
- Required for state funding assistance for projects exceeding 15,000 square feet



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Preparing for Construction

Design Process (D-7 Proceed with bid opening)

Prior to submission, many tasks need to be completed:

- Schematic Design - conceptual site plans, preliminary building sections, approximate dimensions, project schedule, preliminary construction cost estimates
- Design Development - site plan, building plans, sections and elevations to establish final project scope, specification of method of construction and material selections and systems, area analysis, detailed construction cost estimate
- Value Engineering/Analysis
 - required for projects over 50,000 square feet
 - formal process to optimize both cost and performance and/or to identify items that add cost without contributing to the function of the facility



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Preparing for Construction

Design Process (D-7 continued)

- Construction Management plan to OSPI (per WAC 392-344-068)
 - In-house Management vs. Contracted Services
- Construction Documents - Project Manual and Drawings
- General Administration Energy Report and Life Cycle Cost Analysis
- Letters of approval from state and local building officials, code compliance
- Constructability Review
 - required for projects over 50,000 square feet
 - performed by an independent consultant
 - goal of achieving lowest possible bid and to minimize the chances of change orders and claims after construction begins
 - involves reviewing the construction documents and identifying errors, ambiguities, omissions, discrepancies, and conflicts in the construction documents.
- Bid Advertisement



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Preparing for Construction

Bid Evaluation (D-9 Authorization to sign contract)

- The school board adopts a recommendation awarding the contract to the lowest responsible bidder with selected itemized alternate bids
 - District recommendation is based on an analysis of the bids that includes:
 - review of bids for material errors
 - confirmation of bidder responsibility as defined by statute (RCW 39.04.350)
 - satisfactory evidence of financial resources, construction experience, and available resources for performance of the proposed contract

Contract Award



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Preconstruction Conference

- Prior to the start of construction, a precon is held with the District's owner's representative, architect, general contractor and representatives from the local governing jurisdiction

Job Progress Meetings

- Weekly progress meetings are held with the District's owner's representative, architect, consultants, general contractor and major subcontractors

Change Orders

- Modifications to the construction contract are called change orders. The change order process (established by the contract) documents changes in cost, schedule, or responsibility that occur due to:
 - Corrections or clarifications to contract documents
 - Modified project requirements
 - Unforeseen site conditions



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Commissioning (per WAC 392-343-080)

- Systematic process that may begin during the design phase of the project
- May continue for at least a year after project closeout
- Required for projects over 50,000 square feet
- Performed by an independent consultant
- Includes the training of operating staff
- Ensures that all building systems perform according to the documented design intent and the owner's operational needs

Substantial Completion

- Point when contractor begins to turn control of the facility over to District
- Begins warranty period
- Defines punch list and timeline for correction



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Final Completion

- Occurs when the construction work is concluded and the contractor corrects all deficiencies
- Final inspection to confirm completion status according to the terms of the contract
- Submission of project closeout information from the contractor. Includes:
 - Record documents, as-built drawings and specifications
 - Operation & maintenance manuals
 - Guarantees, warranties, and bonds
 - Evidence of compliance with requirements of governing authorities, including certificates of inspection, certificate of occupancy and affidavits of wages paid
 - Contractor's affidavit of payment of debts, claims and taxes
 - Release of liens
 - Surety's consent to final payment



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Construction and Post Construction

Acceptance (D-11)

- When final completion is confirmed in writing by the architect, the district then officially accepts the work by adoption of a school board resolution stating that the work has been completed satisfactorily
- D-11 submission includes commissioning report, area analysis by architect, certificate of completion, occupancy permit, certification of affidavits of wage paid on file as well as lien status
- Final payment of retainage or release of retainage bond may not occur until
 - Releases obtained from Department of Revenue, Employment Security Department, and Department of Labor & Industries
 - D-12 issued by OSPI

Occupancy and Asset Preservation



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