



2017
TEXAS CHARTER SCHOOLS
Conference

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#TCSACon



How to Succeed in Constructing Buildings and Running a School at the Same Time

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*Vice President
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TEXAS CHARTER SCHOOLS
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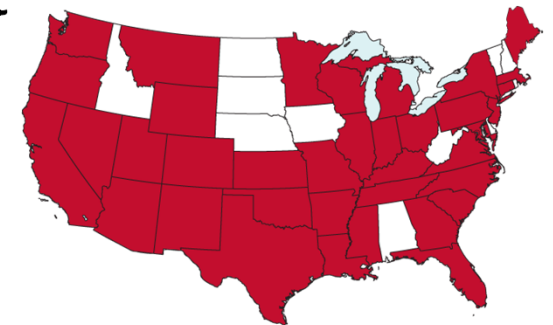
- Introduction
- Managing The Process
- Project Delivery Methods
- Construction Manager As Advisor
 - Service Highlights

Tom Waddle

- Vice President
- Oversees the construction management department
- 40+ years as an contractor, GM of a development & design/build firm, project manager, and consultant

Building Solutions

- Facilities technical advisors—assessment, project management, operations improvement
- 27+ years old, national practice
- 115+ school clients
- Reviewed thousands of buildings



What come to mind when you think about a Construction Project:

- Exciting?
- Chaotic?
- Rewarding?
- Overwhelming?
- Need a help?

- Managing Options:
- Boot strap with existing school staff
- Use the construction management department of the school if there is one (i.e. ISD)
- Hire a construction manager advisor
 - + beginning to end oversight
 - + design & construction knowledge
 - + zoning and permit knowledge, etc.
 - **+ In our organization, our commitment is to provide measurable value to the school that exceeds the fee**

Project Delivery Selection

- Conventional + / -
- Design build + / -
- Developer + / -

+ /- control, costs, checks and balances

Some Initial Questions:

- Q & A with the school = what is needed:
- Masterplan of the campus?
- Zoning review?
- Program needs?
- Budget, cash and Funding requirements?
- Schedule constraints?
- Risk factors?
- Best Project delivery option?

- Development Budget
- Development Schedule
- Charter school legal procurement requirements
- Project team members
- Selecting the Architect
- Selecting the Contractor
- Risk factors – identification and communication
- Special consultants – when are they required?

- The Development Budget includes “soft costs” (professional fees and indirect items and contingency) as well as “construction costs” with the goal of minimizing surprises and creating an “all in” number.

Report Name: Development Budget Target		Date:	
Owner Name: Sample Project		Job #:	
Construction Costs	\$	6,218,550	
Indirect Costs	\$	203,793	
Professional Fees	\$	698,916	
Contingency	\$	356,063	7.5%
TOTAL PROJECT	\$	7,477,322	
Costs:	Item		Total
Renovation			\$ 6,218,550
101	Renovation A Bldg	682,500	
102	Renovation B Bldg	682,500	
103	Admin + Classrooms Addition	3,150,750	
105	Gym Addition	1,702,800	
TOTAL CONSTRUCTION COSTS			\$ 6,218,550

Indirect Costs	Item		Total
Indirect Costs Items			\$ 203,793
200	Permits, Approvals & C.O.	24,874	
201	Dallas Green / Building Fees	12,437	
202	Construction/Materials Testing	37,311	
203	City plan review	1,000	
204	Water & Public Works:	5,000	
205	Cert. Of Occupancy:	permit costs	
206	Insurance & Bonds:	Const. costs	
207	Utility Fees:	Const. costs	
208	Builder's Risk Policy:	15,671	
209	Taxes (construction items):	NA	
210	Closing costs - financial & legal	TBD	
211	Financing--construction interest	TBD	
212	Fundraising consultant	TBD	
213	Promotion	7,500	
214	Legal services:	TBD	
215	Furniture, Fixtures, & Equipment	100,000	
216	Kitchen equipment	TBD	
217	Artwork:	TBD	
218	Library Casework:	TBD	
219	Post construction 12 months of P & I	TBD	
TOTAL INDIRECT COSTS			\$ 203,793



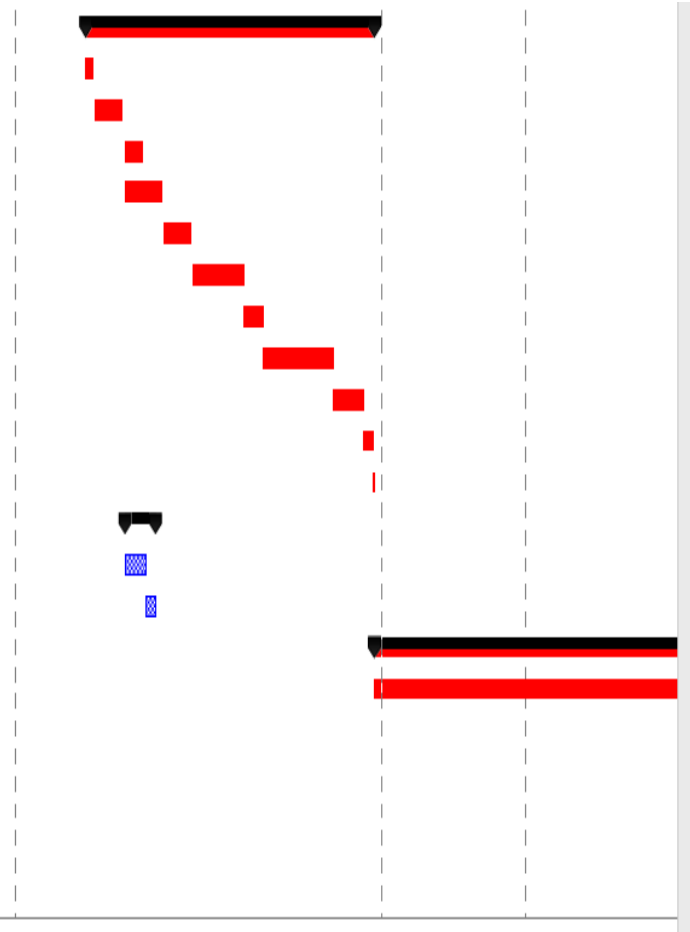
Sample Development Budget

Professional Fees	Item		Total
Design and Management			\$ 633,416
300	Architect/MEP/Structural Fees	404,206	
301	Additional Serv. Allowance:	20,210	
302	Civil Engineering Fee	Included	
303	Landscape Design Fee	Included	
304	Kitchen Design Fee	NA	
305	AV/L/IT Design Fee	NA	
306	Lighting Design Fee	NA	
307	Project Manager Fees	194,000	
308	Reimbursable Expenses, Printing	15,000	
309	Commissioning Agent Fee	0	
310	Peer Review Consultants Fees	0	
Site Information			\$ 65,500
400	Property Surveying	8,500	
401	Environmental Surveys:	5,000	
402	Borings, Soils, Foundation:	9,500	
403	Re-Platting	12,500	
404	Zoning	30,000	
\$ 698,916	TOTAL PROFESSIONAL FEES		\$ 698,916

- The Development Schedule tracks all preconstruction and construction activities, identifies the critical path, and ensures the project is completed on time
- All team member's responsibilities are represented in the schedule

ID	Task Name	Duration	Start	Finish	2017												2018												
					Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	
1	PRECONSTRUCTION PHASE	177 days	1/6/17	9/14/17																									
2	Construction Manager Selection	35 days	1/6/17	2/23/17																									
3	Eldg Solutions selection / contract	15 days	1/6/17	1/26/17																									
4	Kickoff meeting	3 days	1/27/17	1/31/17																									
5	Finalize CM Advisor contracts	20 days	1/27/17	2/23/17																									
6	Owner Provided Items	15 days	1/6/17	1/26/17																									
7	School Program / Phases	15 days	1/6/17	1/26/17																									
8	Project budget	15 days	1/6/17	1/26/17																									
9	Establish Budget & Schedule	10 days	2/1/17	2/14/17																									
10	Research zoning status / requirements	5 days	2/1/17	2/7/17																									
11	Eldg Solutions provides Development Schedule	5 days	2/1/17	2/7/17																									
12	Eldg Solutions provides Development Budget	5 days	2/1/17	2/7/17																									
13	Approval of Budget, Schedule and Phases	5 days	2/8/17	2/14/17																									
14	Architect Selection	41 days	1/27/17	3/24/17																									
15	File Public Notice	10 days	1/27/17	2/9/17																									
16	Architect vetting and selection	5 days	2/10/17	2/16/17																									
17	Architect Selection / Notice To Proceed	1 day	2/17/17	2/17/17																									
18	Architect Contract	25 days	2/20/17	3/24/17																									
19	Consultant Services (if required)	118 days	2/15/17	8/1/17																									
20	File Public Notice	1 day	2/15/17	2/15/17																									
21	Acquire Zoning & TMP services	12 days	2/27/17	3/14/17																									
22	Acquire Survey and re-platting services	12 days	2/27/17	3/14/17																									
23	Acquire Geotech services	12 days	4/3/17	4/18/17																									
24	Environmental Survey services	25 days	4/3/17	5/5/17																									
25	Acquire Permit Consultant	25 days	4/17/17	5/19/17																									
26	Acquire Const. Material Testing services	25 days	6/27/17	8/1/17																									
27	Zoning + Permitting	141 days	2/27/17	9/14/17																									
28	SUP amendment	110 days	3/15/17	8/17/17																									
29	Re-platting	110 days	2/27/17	8/1/17																									
30	Building Permit	20 days	8/16/17	9/13/17																									
31	Building Permit Release after SUP approval	1 day	9/14/17	9/14/17																									

32	Design Phase	146 days	2/20/17	9/14/17
33	Programing / Zoning compliance	5 days	2/20/17	2/24/17
34	Concept Design	15 days	2/27/17	3/17/17
35	Concept Design estimate / approval	10 days	3/20/17	3/31/17
36	Schematic Development issued for approval	20 days	3/20/17	4/14/17
37	Schematic Development estimate / approval	15 days	4/17/17	5/5/17
38	Design Development issued for approval	25 days	5/8/17	6/12/17
39	Design Development estimate / approval	10 days	6/13/17	6/26/17
40	100% Construction Documents for bid & permit	35 days	6/27/17	8/15/17
41	Final Contractor estimate / GMP	15 days	8/16/17	9/6/17
42	Review & recommends award	5 days	9/7/17	9/13/17
43	Owner Notice To Proceed + approval of GMP	1 day	9/14/17	9/14/17
44	GC Selection	16 days	3/20/17	4/10/17
45	File Public Notice	11 days	3/20/17	4/3/17
46	GC vetting and selection	5 days	4/4/17	4/10/17
47	CONSTRUCTION PHASE	238 days	9/15/17	8/21/18
48	Project Construction	212 days	9/15/17	7/16/18
49	Contingency	20 days	7/17/18	8/13/18
50	Owner Move In Connector + Project	6 days	8/14/18	8/21/18
51	Systems training by Contractor	5 days	8/14/18	8/20/18
52	FFE deliveries	5 days	8/14/18	8/20/18
53	School Occupancy	1 day	8/21/18	8/21/18



- The legal procurement requirements for Charter School have much in common however they are not all the same. The State has very specific statutes that detail the process for procuring architects, consultants and vendors. Working with the school's legal counsel, the CMA oversees the proper application of the legal process for the school.

- **Table of Contents**
- Request for Proposals
- Information for Offerors
- Proposal Form
- Contractor's Qualification Statement
- Construction Manager at Risk Questionnaire
- Required Certification Forms
- Request for Taxpayer Identification Number and Certification
- Conflict of Interest Questionnaire
 - Non-Collusive Proposal Certificate & Acknowledgment
- Felony Conviction Notification
- Certification Regarding Debarment Suspension, Ineligibility and Voluntary Exclusion – Lower Tier Covered Transactions
 - Clean Air and Water Act Certification
 - Certification Regarding Lobbying for Federal Funds
- Child Support Certification (37 PAGES TOTAL)

- Like the conductor of a symphony, the CMA knows the “score,” who is in each of the orchestra sections and timing of their participation. The performance needs a full orchestra and the CMA will advise the school what that requires for the project. The list of usual suspects includes:
- Architect
 - Mechanical
 - Electrical
 - Plumbing
 - Civil
 - Landscape
 - Acoustical
 - Lighting
- Audio Visual, IT, Data and Phones
- Geotechnical
- Construction Material Testing
- Traffic Management Plan
- Zoning Consulting
- Permit Expeditor

- How does a school know what firm is the best choice for their project? The CMA manages the selection process of an architect via a Request For Qualifications (RFQ) in a manner consistent with the State of Texas procurement statutes. Information requested of the architect pertinent to the project is detailed in the RFQ.

- For example: what similar projects has the firm completed?
- Who are the proposed team members for this project and what similar projects have they individually completed?
- What is the firm's history of projects volume per year?
- What is the firm's current workload?
- The RFQ provides a "scoring" point system that objectively allows the school to measure each firm in comparison with the others.
- Timing is important, and answers to the RFQ often lets the school know which firms are proposing the "A team" with experience on other similar projects, or the "B team" that was recently hired; if the firm can meet the project schedule demands; which professional consultants they propose to be involved, etc.

- There are typically two contractor service options to consider: Construction Manager At Risk (CMAR) and Competitive Sealed Proposal (CSP). Design Build is a viable third option as well.

- How does a school know what contractor is the best choice for their project?
- The CMA manages the selection process of a contractor via a Request For Proposal (RFP).
- For example: what similar projects has the firm completed?
- Who are the proposed Superintendent and Project Manager?
- What similar projects have they completed individually and as a team?
- How long have they been with the company?
- What is the firm's history of projects volume per year?
- What is the firm's current workload?
- The RFP also provides a "scoring" point system that objectively allows the school to measure each contractor in comparison with the others.
- Answers to the RFP often lets the school know which firms are proposing the "A team" with experience on other similar projects, or the "B team" that was recently hired; the firm's history of past legal claims, if the contractor can meet the project schedule demands, how their general conditions and fees line up to other bidders, etc.

- Zoning & Special Use Permits (SUP)
- Traffic Management Plans and Traffic Impact Analysis
- Neighbors
- Unknow site or building conditions
- Permit acquisition time
- Code requirements and changes
- Schedule delays
- Elevators
- Health Department & kitchens
- Acquiring Certificates Of Occupancy on time

- Zoning & Special Use Permits (SUP) consultants
- Traffic Management Plans
- Traffic Impact Analysis consultants
- Geotechnical Services
- Environmental
- Dallas Green / Commissioning
- Construction Material Testing Services
- IT, AV, Video, Security

- Building new, renovating existing or expanding campus facilities can be an exciting but chaotic time for a school.
- Planning and executing construction on campus introduces an entirely new layer of activity and expectations of a school's Administration that can detract from core duties.
- Understanding and managing the process, delivery methods and critical path is crucial
- A Construction Manager Advisor (CMA) can be a guide to the school from the beginning to the end and enable a successful and safe process with a rewarding result.

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