

# You have a building, now what?

CBRE

Houston ISD

April 1, 2022



# “Project closeout is my favorite phase of construction.”

**Nobody**

At any point in the  
history of mankind.  
Ever.





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# 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

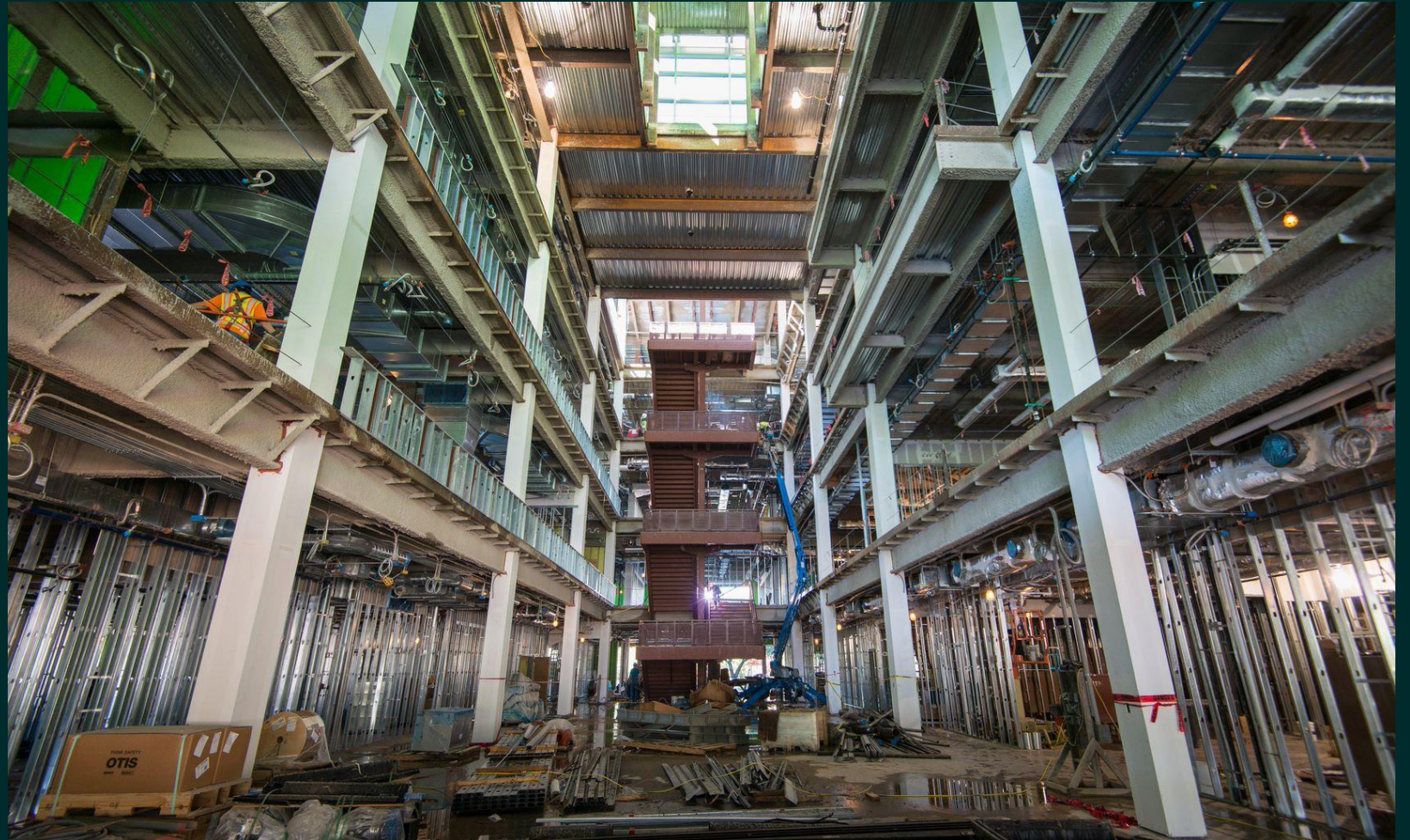
## Safety & Security

- Ingress / Egress
- Access Control
- CCTV
- Signage





# Construction





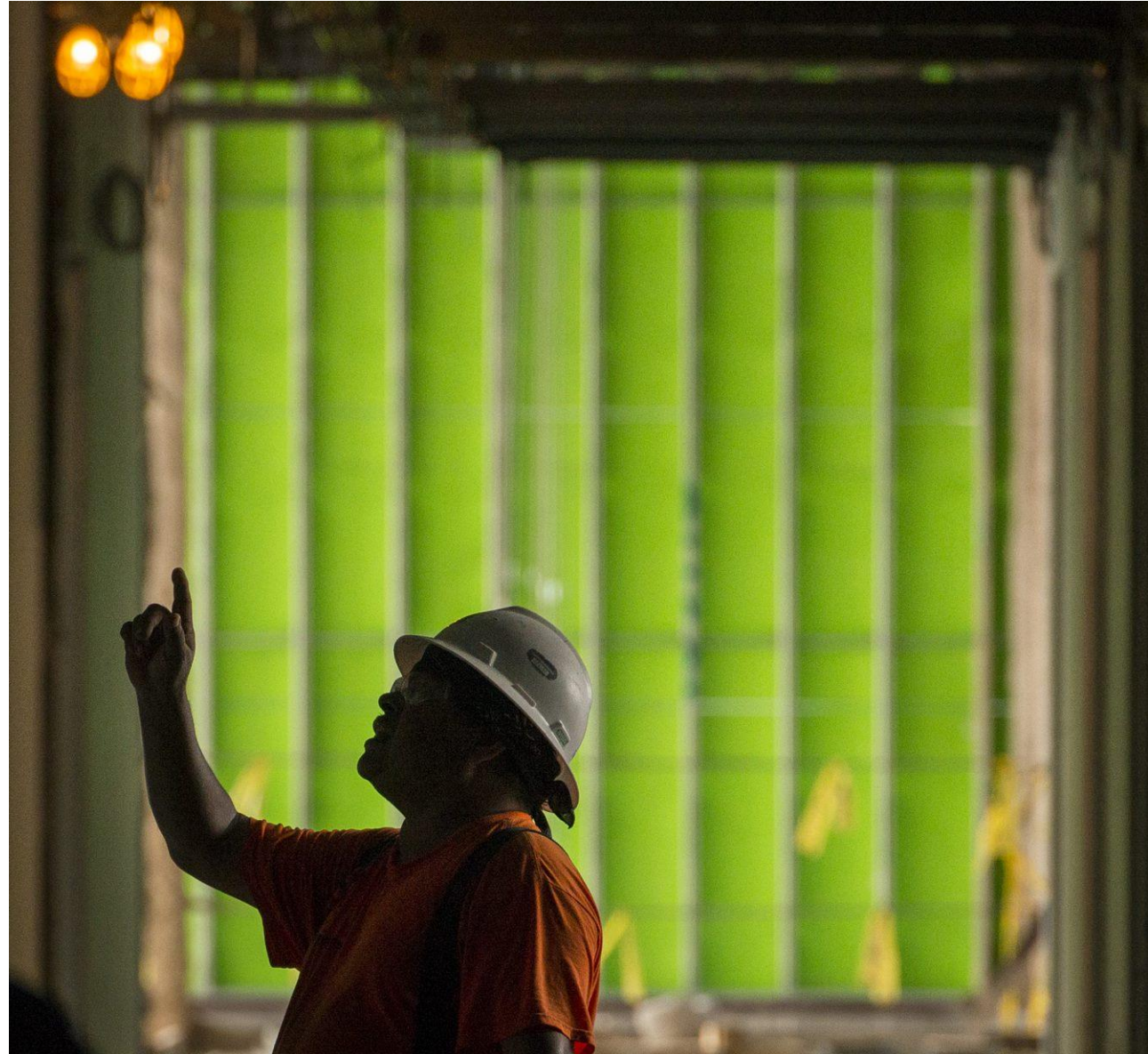
# Quality Control

## 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



# Post-Construction





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## 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



- Operations
- Finance
- Legal

# Acceptance

# Risk Management

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

## Technology

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

# Energy Management

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

## Nutrition Services

- Health Operating Permits
- Food Deliveries

## Maintenance

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

## Safety & Security

- Programming & Monitoring

West Lake Middle School (MS #3)  
Table of Contents / Checklist

	Received
Project Disclosure Table of Contents (front page of all binders)	
1 List of Subcontractors	X
2 Bonds	X
3 Performance Bond (\$25,000 and above) - <b>must be original &amp; provided at beginning of project</b>	X
4 Performance Bond (\$100,000 and above) - <b>must be original &amp; provided at beginning of project</b>	X
5 Certificate of Insurance Coverage	X
6 District Contract or AIA invoice & payment doc	X
7 Paint Color Schedule	X
8 Texas Department of Licensing and Regulation: ADA Compliance Inspection (Not required for class-001)	X
9 Certificate of Occupancy (Certificate of Compliance)	X
10 Certificate of Project Compliance - TEA	X

HISD 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@houstonisd.org](mailto:securitymaintenance@houstonisd.org)

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 Alphaone 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 sensors
- Door contacts
- Door repair
- Doors strikes or electrified hardware

Alphaone 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 near entry
  - Pools
  - Band Room
  - Boys/Girls locker rooms
  - Coach's office
- Motion sensors wall 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 18/4 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

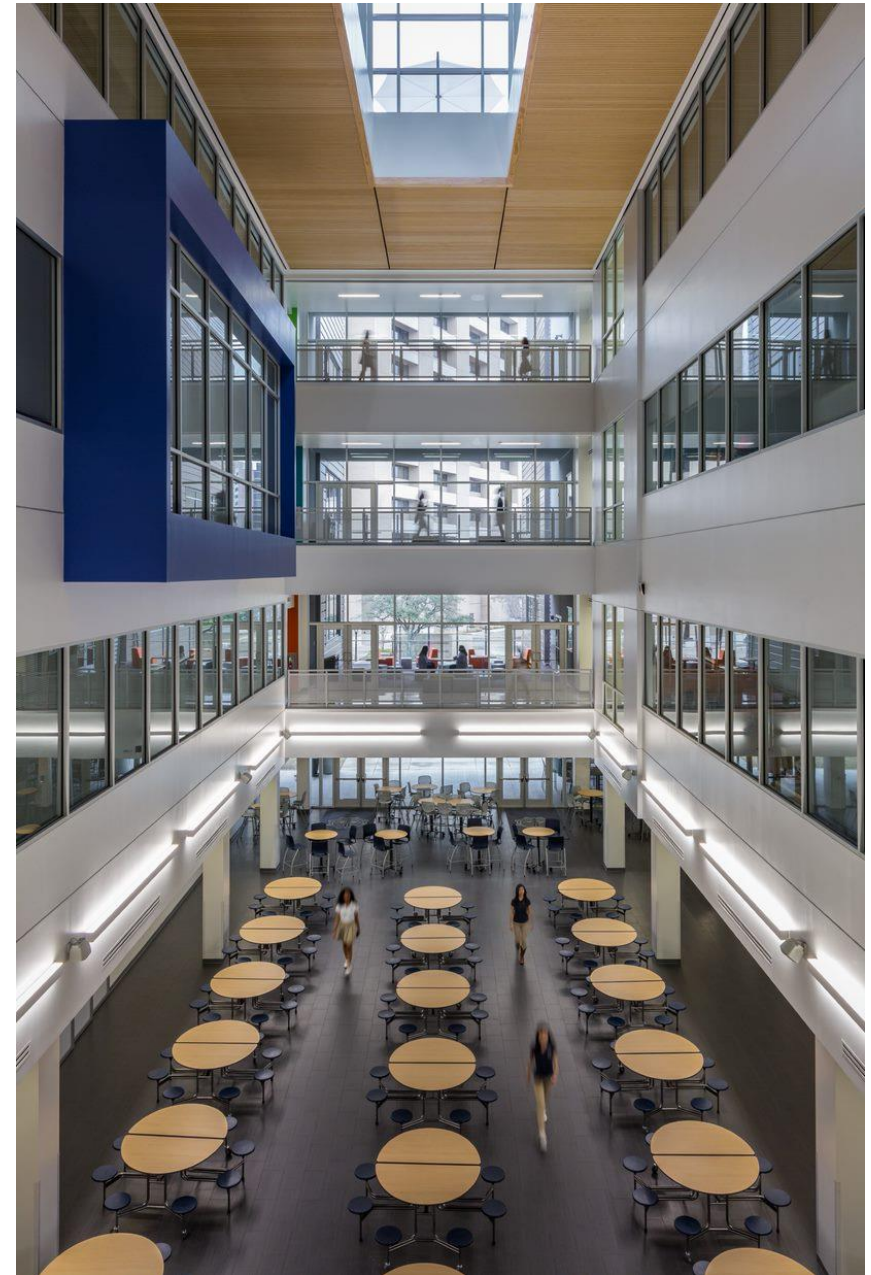
- AED's / Bleed Kits

### 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





Making your  
facility work is  
the real  
objective.



*Thank you!*

Questions?

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