

Owner's Perspective on Team Collaboration





Brenda Garcia
Director of Facilities
Planning and Construction

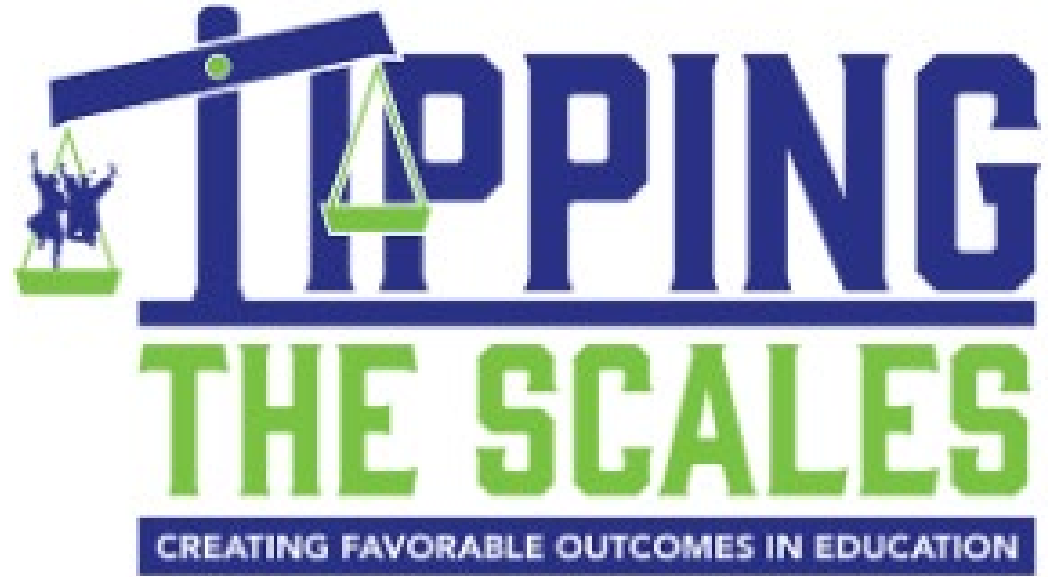


Megan Irvin
Project Manager Facilities,
Planning and Construction



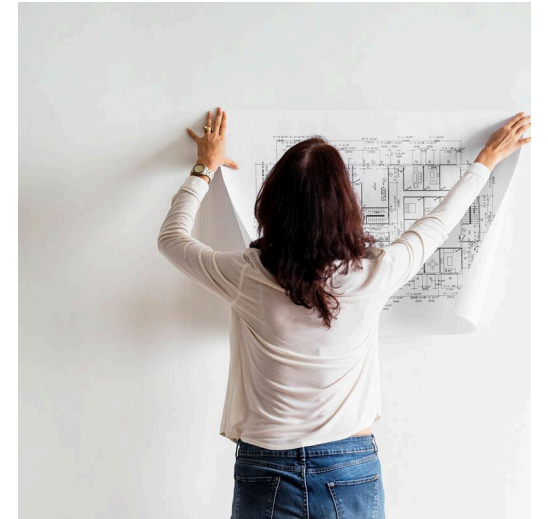
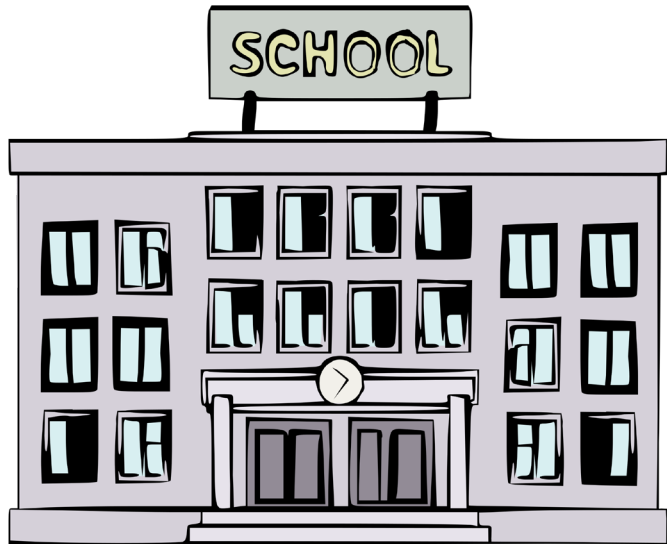
Ashley Dixon
Director Bond Construction





TIPPING THE SCALES

CREATING FAVORABLE OUTCOMES IN EDUCATION



TODAY'S TOPICS



Texas Code Requirements



Managing Expectations



Professional Services Selection



Project Completion



Contractor Selection



Move-In & Activations



Board Timelines & Language



Team Collaboration Strategies



Campus Readiness



Resources

AUDIENCE SURVEY



How many ISD's?



How many design professionals?



How many owner consultants?



**Review District demographics, Texas Code Requirements,
and Explore How Local Policies and Procedures
Impact Project Schedules**

DISTRICT PROFILES, GOV'T CODE AND LOCAL POLICIES

173 SQUARE MILES

ALMOST 97,000 STUDENTS

79 SCHOOLS

KATY

170 SQUARE MILES

OVER 79,000 STUDENTS

86 SCHOOLS

GOOSE CREEK

134 SQUARE MILES

OVER 24,000 STUDENTS

32 SCHOOLS

FORT BEND

Code Requirements



Board Approvals



Texas Education Code

Long Range Plan, Method of Compliance, Level of Flexibility and Educational Specifications

– TEA-required as of November 2021

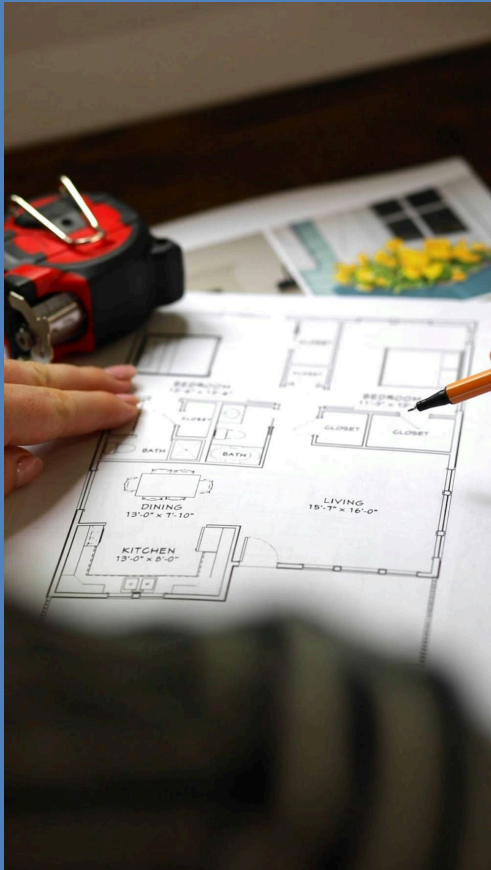


**Government Code Chapter 2254
Professional and Consultant Services**



**Government Code Chapter 2269
Contracting and Delivery Procedures
for Construction Projects**

Professional Services



Texas Government Code

– (excerpt) the governmental entity shall select the architect or engineer on the basis of demonstrated competence and qualifications as provided by Section 2254.004

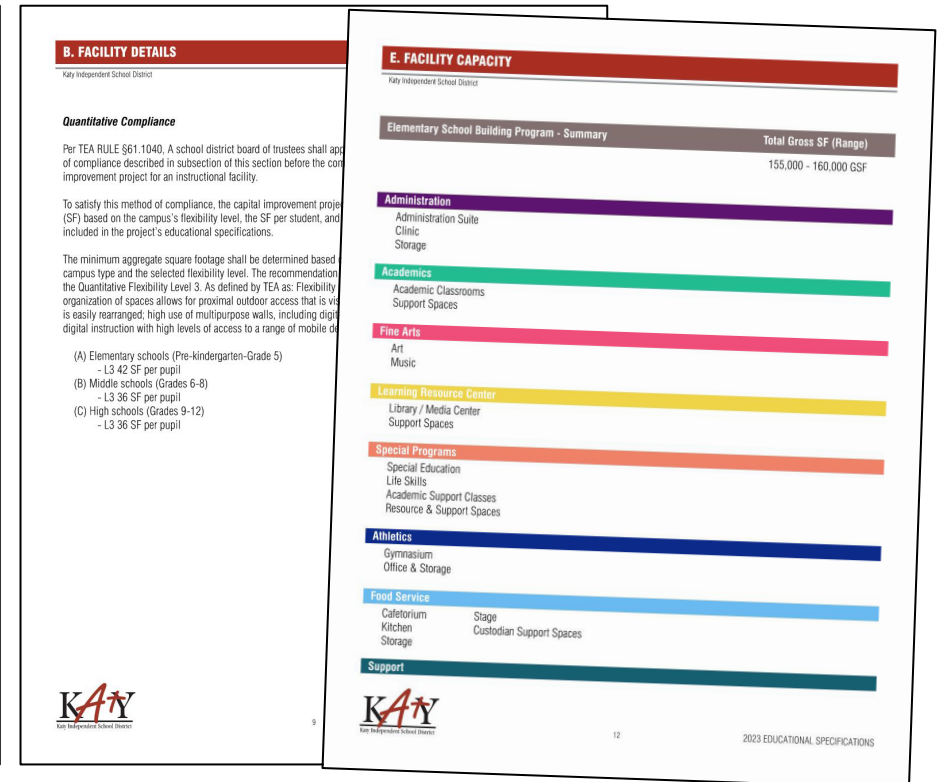
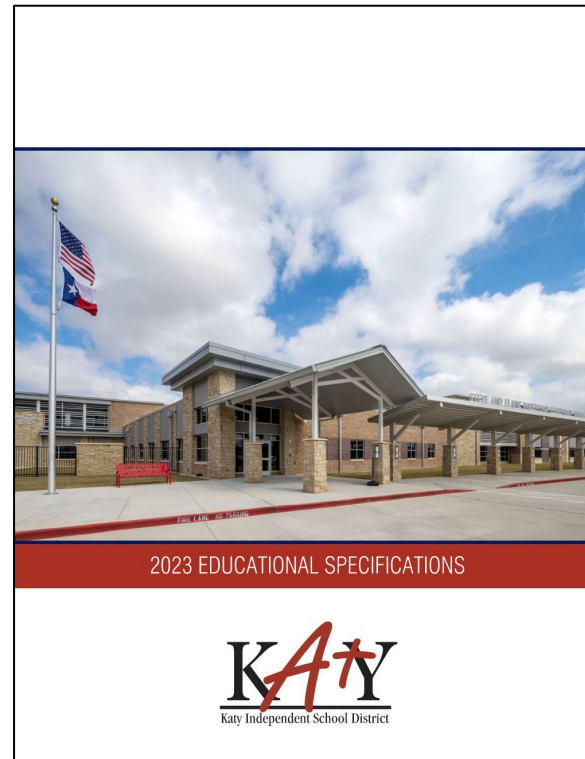
- **What is considered a Professional Service?**
 - Architects
 - Engineers
 - Geotechnical
 - Materials Testing
 - Test & Air Balance
 - Commissioning

Texas Education Code Requirements



Educational Specifications

– TEA - required as of November 2021





Common Delivery Methods

Delivery Methods






● Competitive Sealed Proposals (CSP)

- Proposals' rank & best value for the District
- Bid proposal in project specifications & contract documents
- Competitive Bidding - "low bid" (not recommended)

● Construction Manager at Risk (CMAR)

- Provides services from design through
 - construction
- Selection based on a 1-step or 2-step method

Bond Program Procurement - District Specific Methodology			
Architects	RFQ Vendor Pool BOT approves individual contract	RFQ Vendor Pool	1 RFQ per Bond Vendor pool (10)
Other Professional Service	RFQ Vendor Pool Typ. 3-5 BOT approval	RFQ Vendor Pool	RFQs per Bond Vendor pool (3-6)
Job Order Contractors	O&M uses JOCs through Co-Op	Co-Op	1 CSP per Bond Vendor pool (5)
General Contractors	CSP (new construction) CMaR (renovation projects) Board approval	Project Flexible	CSP (Default) CMaR 2 Step (alternative) Board Approval



Example KISD's – CMaR Weighted Criteria

- 30% Purchase price
- 30% Performance of the contractor of Construction Manager and quality of the work based on past work record
- 30% The extent to which the goods and services meet the District's needs
- 10% Past relationship with the District.

Construction Manager at Risk Rankings for

				30%	30%	30%	10%		
				Cost	Perf	District Needs	Past Relationship	Final	
	% FEE	GC	TOTAL \$						
	2.25%	\$450,000	\$61,800	\$511,800	28.51	23.06	24.03	7.31	82.91
	2.00%	\$400,000	\$77,000	\$477,000	28.90	23.25	24.92	7.83	84.90
	1.98%	\$396,000	\$54,109	\$450,109	29.42	25.22	26.55	8.46	89.65
	2.75%	\$550,000	\$59,098	\$609,098	26.08	27.38	28.31	8.88	90.65
	1.95%	\$390,000	\$59,775	\$449,775	29.41	24.54	26.50	7.85	88.30
	2.97%	\$594,000	\$59,700	\$653,700	25.00	22.75	22.44	6.94	77.13
	1.75%	\$350,000	\$78,650	\$428,650	30.00	21.78	22.59	6.48	80.85

Example – FBISD’s CSP Weighted Criteria



EVALUATION CRITERIA:

Proposals shall be evaluated using the evaluation criteria listed below, and the scope of work will be awarded by Project. Based on scope of work, FBISD reserves the right to award the Project to the top ranked contractor in the manner that provides the best value to the district based on price and other evaluation criteria.

	Evaluation Criteria (Government Code 2269)	Point System
1	The price; Section 2269.055.a (1) Total Proposed Pricing - Provides thoroughly developed, competitive pricing using the tables in Pricing Delivery information section of the CSP	40 points
2	Offeror’s experience and reputation; Section 2269.055.a (2) Provides evidence of your experience in planning, staging and delivery of recent projects of similar scope and scale (14 pts)	19 points
	Past experience with FBISD and other school districts Provides a summary of nature of work, on time delivery and quality of work contracted with FBISD and/or other school districts and FBISD’s assessment of the presented summary. (5 pts)	
3	Quality of the offeror’s goods or services; Section 2269.055.a (3) Contractor’s products should be new and be of the highest quality with an option to substitute for a company branded item of equivalent quality. (14pts)	21 points
	Quality of contractor’s response in the proposal Effectively responds and processes all request for information and documentation included in this CSP (2pts)	
	Project Plan and schedule (5pts)	
4	Utilization of historically underutilized businesses; Section 2269.055.a (4)	N/A
5	Offeror’s safety record; Section 2269.055.a (5) Provides a summary of Experience Modification Rate (EMR) for the last three years, as well as a summary of your company’s safety policies and procedures	5 points
6	Offeror’s proposed personnel; Section 2269.055.a (6) Proposed Personnel, personnel directly assigned to work on this project	5 points
7	Offeror’s financial capability appropriate to the size and scope of the project; Section 2269.055.a (7) Provide proof of Insurance, financial stability and Letter of Surety from Bonding Company	5 points
8	SBE Commitment; CV (Local) 2017.04	5 points
	TOTAL	100

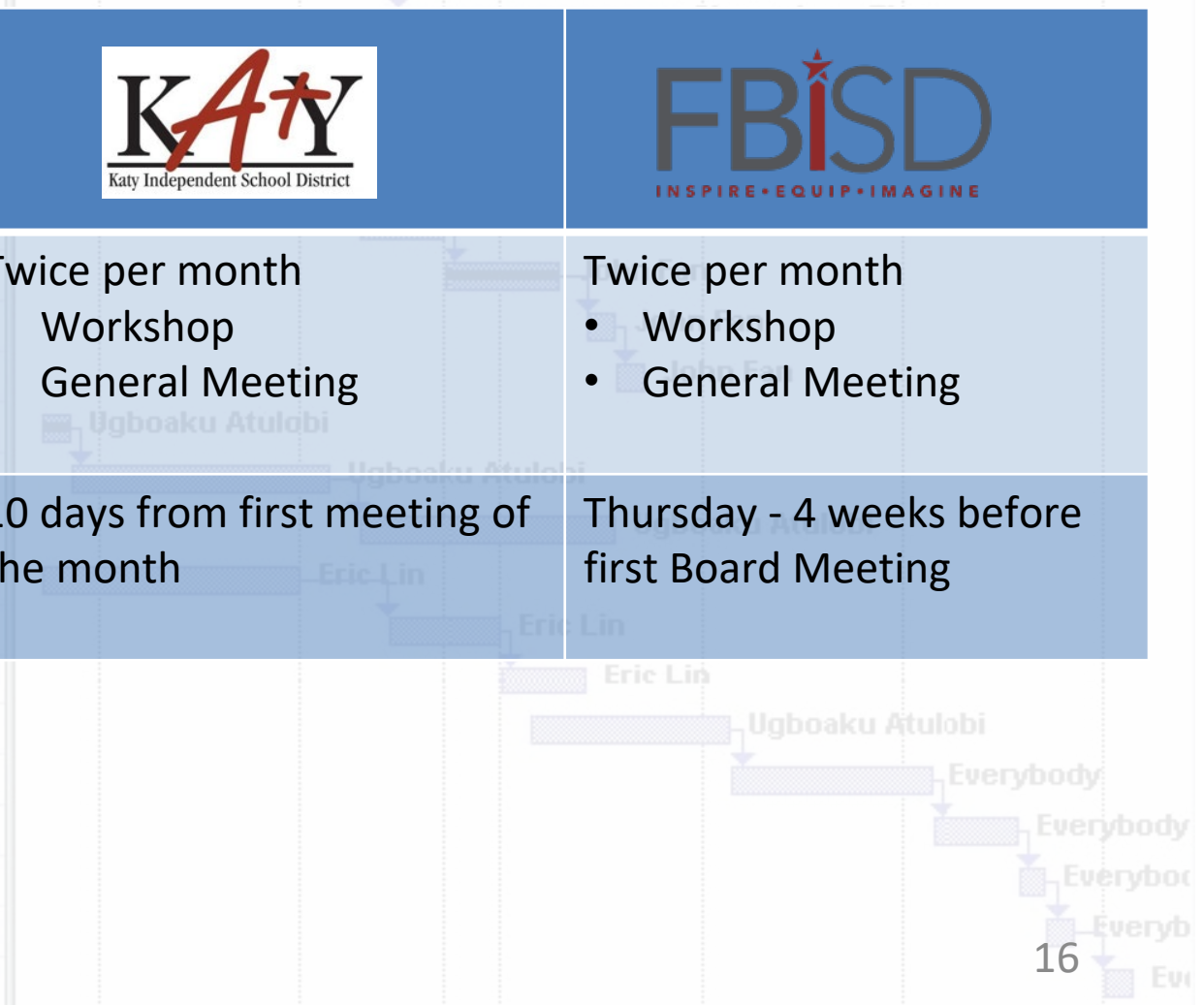
Task Name	Duration	Start	Finish
1 Design Server database structure	2 days	Sat 4/7/01	Sun 4/8/01
2 Implement Database Module	6 days	Mon 4/9/01	Sat 4/14/01
3 Implement Database Utility Module	4 days	Sun 4/15/01	Wed 4/18/01
4 Implement SuperUserManager Module	2 days	Thu 4/19/01	Fri 4/20/01
5 Implement I/O modules	7 days	Sun 4/8/01	Sat 4/14/01
6 Research RMLite and Ninja	4 days	Sun 4/15/01	Wed 4/18/01



Board Information			
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Frequency of Meetings	Once Per Month	Twice per month	Twice per month
Final Submission Deadline	8 days	10 days from first meeting of the month	Thursday - 4 weeks before first Board Meeting

13 Implement Authentication Manager Module	1 day	Thu 4/26/01	Thu 4/26/01
14 Implement Log Manager Module	1 day	Fri 4/27/01	Fri 4/27/01
15 Research OSKI	1 day	Sat 4/7/01	Sat 4/7/01
16 Implement User Synchronization Module	9 days	Sun 4/8/01	Mon 4/15/01
17 Implement SuperUserManager Module	9 days	Wed 4/18/01	Thu 4/25/01
18 Implement PalmOS GUI screen modules	9 days	Sat 4/7/01	Sun 4/14/01
19 Implement Client Rendezvous Application Module	4 days	Thu 4/19/01	Sun 4/22/01
20 Implement UI Manager Module	3 days	Mon 4/23/01	Wed 4/25/01
21 Design Intergration Tests	7 days	Tue 4/24/01	Mon 4/30/01
22 Intergration Testing	7 days	Tue 5/1/01	Mon 5/7/01
23 Blackbox Testing	3 days	Tue 5/8/01	Thu 5/10/01
24 User Testing	1 day	Fri 5/11/01	Fri 5/11/01
25 User Manual	1 day	Sat 5/12/01	Sat 5/12/01
26 Presentation Preparation	1 day	Mon 5/14/01	Mon 5/14/01



Board Agenda

“CONSIDERATION OF AND POSSIBLE ACTION TO **APPROVE THE CONSTRUCTION MANAGER AT RISK (CMAR) EVALUATION RANKINGS AND SELECTION OF, DELEGATE AUTHORITY TO THE SUPERINTENDENT OR DESIGNEE TO NEGOTIATE AND TO APPROVE THE CONTRACT AND SUBSEQUENT GUARANTEED MAXIMUM PRICES** WITH, (INSERT CONTRACTOR NAME) **OR SUBSEQUENTLY RANKED CONTRACTORS** FOR (INSERT PROJECT NAME)”

Board Rationale

- **The goal of this project** will be to construct a new facility for approximately 350 Pre-K students. The facility will accommodate full-day instruction via innovative design to support high-level engagement and executive function discovery.
- The **estimated project cost** is Ten Million Dollars (\$10,000,000) for construction and Two Million Five Hundred Thousand Dollars (\$2,500,000), for soft costs.
- On December 14, 2020, **the Board of Trustees approved** Construction Manager at Risk as the **Delivery Method** for this project.
- On January 28, 2021, the Evaluation Team, consisting of personnel from GCCISD Facilities Planning and Construction, **evaluated the responses to the Request for Proposals (RFP #21-011)**. This activity was overseen by the Director of Purchasing.
- The Administration is **recommending the approval of the evaluation rankings** and delegation of authority to the Superintendent or designee to negotiate and to approve the contract and subsequent Guaranteed Maximum Prices, with (insert contractor name), as the best value to the District, or subsequently ranked contractors if necessary.
- **Upon the approval of a contract, (insert contractor name) may proceed with the project** in coordination with the Architect and District.
- **This request is made as directed by the Texas Government Code Chapter 2269.** If a contract cannot be successfully negotiated with (insert contractor name), negotiations will be ended, and the District will negotiate with the next highest-ranking offeror, and so on, until a contract is reached, or all proposals are rejected.

Campus Readiness



Preparing for a Project



Renovation Scheduling



Temporary Relocation

- Clear communication regarding building accessibility
- Safety
- Campus progress visits



Moving & Storage

- Climate control
- Security



Communication – Campus/Community

- Summer school
- Summer camps
- Playground access
- Campus rentals



CAMPUS IMPROVEMENTS COMING SOON:

- 1 NEW CLASSROOM WING ADDITION**
- 2 NEW PLAYGROUND CANOPY**



- CLASSROOMS
- RESOURCE ROOMS
- ADMINISTRATIVE
- CIRCULATION SPACE
- RESTROOMS / SERVICES



OPENING AUGUST 2025

HAZEL S. PATTISON ELEMENTARY BUILDING ADDITION

KATY INDEPENDENT SCHOOL DISTRICT



Noise



Smells



Testing

RLA Tuesday, April 8, 2025	RLA Wednesday, April 9, 2025	RLA Thursday, April 10, 2025
Grade 5	Grade 4	Grade 3
No Primary	Grades 3, 4, & 5	No Primary
No Primary	Grades 4 & 5	Grade 3
Grade 5	Grade 4	Grade 3
Grade 3	Grade 4	Grade 5
Grade 5	Grade 4	Grade 3
Grade 3	Grade 4	Grade 5
No Primary	Grades 3, 4, & 5	No Primary

MANAGING DISTRICT & CAMPUS CONSTRAINTS & EXPECTATIONS



LOGISTICS UPDATE



PHASE 1

COVERED PLAY AREA





Prior to Substantial Completion

1. All **fire alarm system** components must be completed and demonstrated to the Owner.
2. Local fire marshal approval certificate, or similar **Certificate of Occupancy** from the governing agency, must be delivered to the Owner.
3. All **exterior** clean-up and landscaping must be complete.
4. All final **interior** clean-up must be complete.
5. All HVAC **air and water balancing** must be complete.
6. All required **commissioning** must be complete.
7. All **Energy Management Systems** must be complete and fully operational and **demonstrated to the Owner**.
8. All **communications** equipment, telephone system, and P.A. systems must be complete and demonstrated to the Owner.
9. All final **lockset cores** must be installed and all final Owner directed keying completed.
10. All **room plaques** and exterior signage must be completed.
11. All **Owner demonstrations** must be completed including kitchen equipment, HVAC equipment, plumbing equipment, and electrical equipment.



Substantial completion



§ 9.8.6 In order for the project or a major portion thereof to be considered substantially complete, the following conditions must be met:



.1 All inspections by governmental authorities having jurisdiction over the project must have been finalized, any remedial work required by those authorities must have been completed, and Certificates of Occupancy and similar governmental approval forms must have been issued and copies delivered to the Owner and Architect.



.2 All work, both interior and exterior, shall have been completed and cleaned except minor items which if completed after occupancy, will not, in the Owner's opinion, cause interference to the Owner's use of the building or any portion thereof. A significantly large number of items to be completed or corrected will preclude the Architect from issuing a Certificate of Substantial Completion. The Owner and Architect will be the sole judge of what constitutes a significantly large number of items.

Project Completion



Check List

Certifications and building occupancy



Coordination of FF&E and technology installation

Trainings; systems and equipment



Building turnover (Contractor & Maintenance)

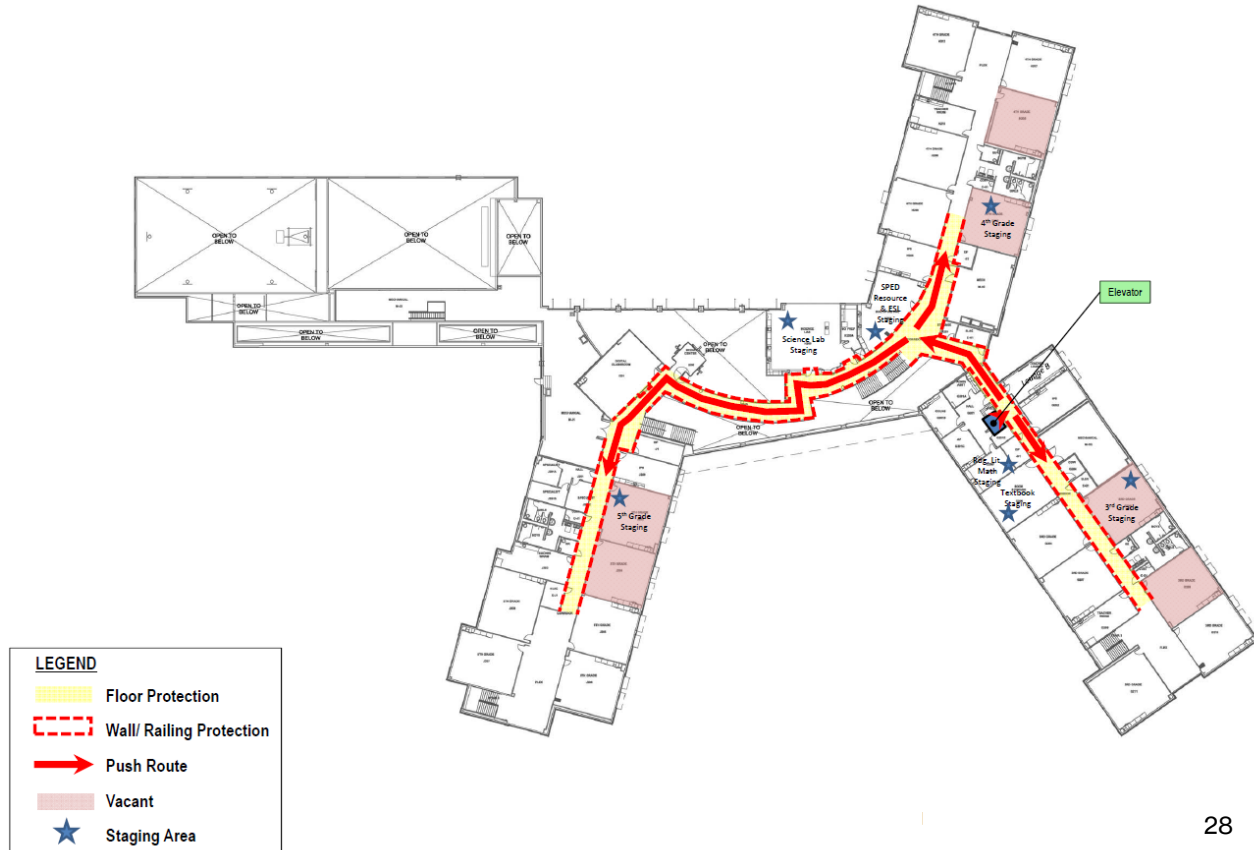
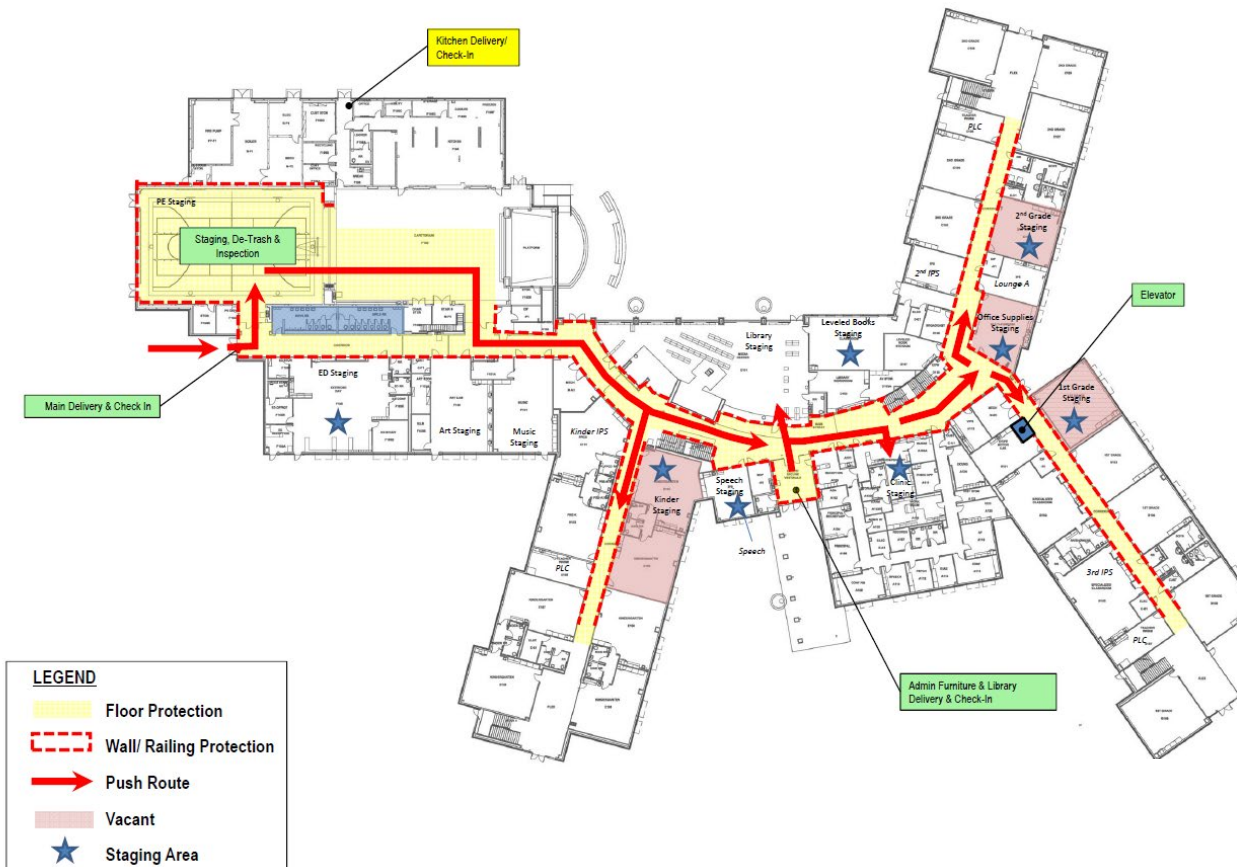
- Detention ponds
- Fencing
- Mechanical maintenance – air filters



Warranty Period

- Clarification of work orders vs warranty items
- Designated warranty point of contact

Sample Activation Staging Plan



DISTRICT SHOP TALK

Discover District insights to effective and ineffective team collaboration



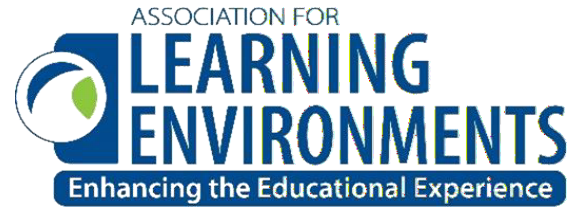
What Owner's Love



- Early Coordination of Final Room Numbers
- Communication
- Have the hard conversations early (budget, schedule, permitting, inspections, etc.)
- Problem Solving Mentality
- Details generated from OUR TDGs and Ed Specs
- Schedules generated from OUR district's submission timelines
- Team members accountability
- Share positive experiences from other district's standards, design solutions, contract language, etc.
- Partnership with our design and construction teams



RESOURCES



www.a4le.org



www.agc.org



www.statutes.capitol.texas.gov

Texas Statutes → Gov't Code → Title 10.
General Gov't → Subtitle F → State & Local
Contracts & Fund Mgmt → Ch 2254/Ch 2269



Regional Education Service Centers

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