



School Improvement Bond Update

Bond Accountability Committee Meeting

January 25, 2018



Agenda

- **Welcome & Introductions** 5:30 pm
- **Public Comments** 5:35 pm
- **Program Update** 5:45 pm
- **Project Reports** 6:45 pm
- **Questions** 8:00 pm
- **Wrap-Up and Adjourn** 8:20 pm



Public Comments



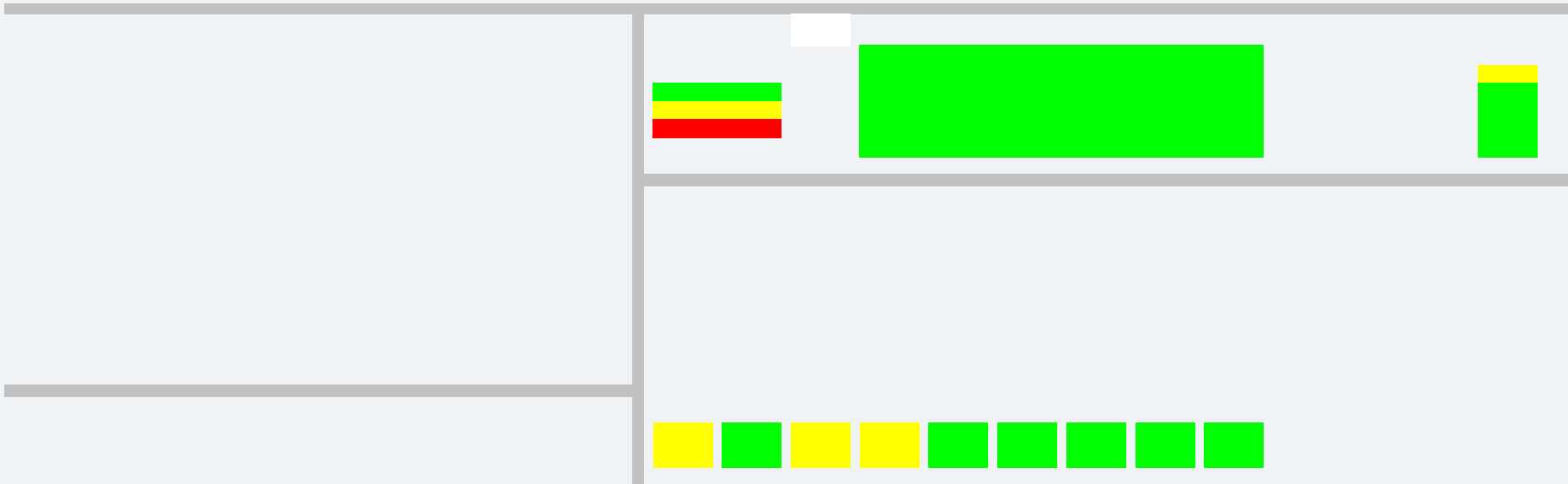
THE BOARD OF SCHOOL BUILDING IMPROVEMENT BOND



SCHOOL BUILDING IMPROVEMENT BOND



Program Update





2012/2017 Bond Program

SCHOOL BUILDING IMPROVEMENT BOND

SCHOOL BUILDING IMPROVEMENT BOND

Accomplishments

Challenges & Opportunities

‰ Manpower within OSM

‰ Multiple procurements running concurrently

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2012/2017 Bond Program

Upcoming Events/Milestones

%o Master Program Schedule development

%o Performance auditing services RFP

%o Interested Consultant Program roll-out

%o Learning opportunities for staff – LEAN practices in action, High Performing Teams, potential for LEAN bootcamp, exploring D/B learning opportunities

%o Executive Team kick-off –



Program Update

Lessons Learned

- CM/GC Outreach (memo attached to packet)
 - Need for proactive “marketing” of projects by OSM staff
 - Need for active “brand management” by OSM leadership
 - PPS staffing is highly critical
- Revisions to CM/GC agreement following Grant HS negotiations
 - Change of GCs/GRs from Fixed Fee to Time Spent
 - Revisions to reporting requirements
 - Requirement for quarterly reconciliation of CM/GC billings



Program Update

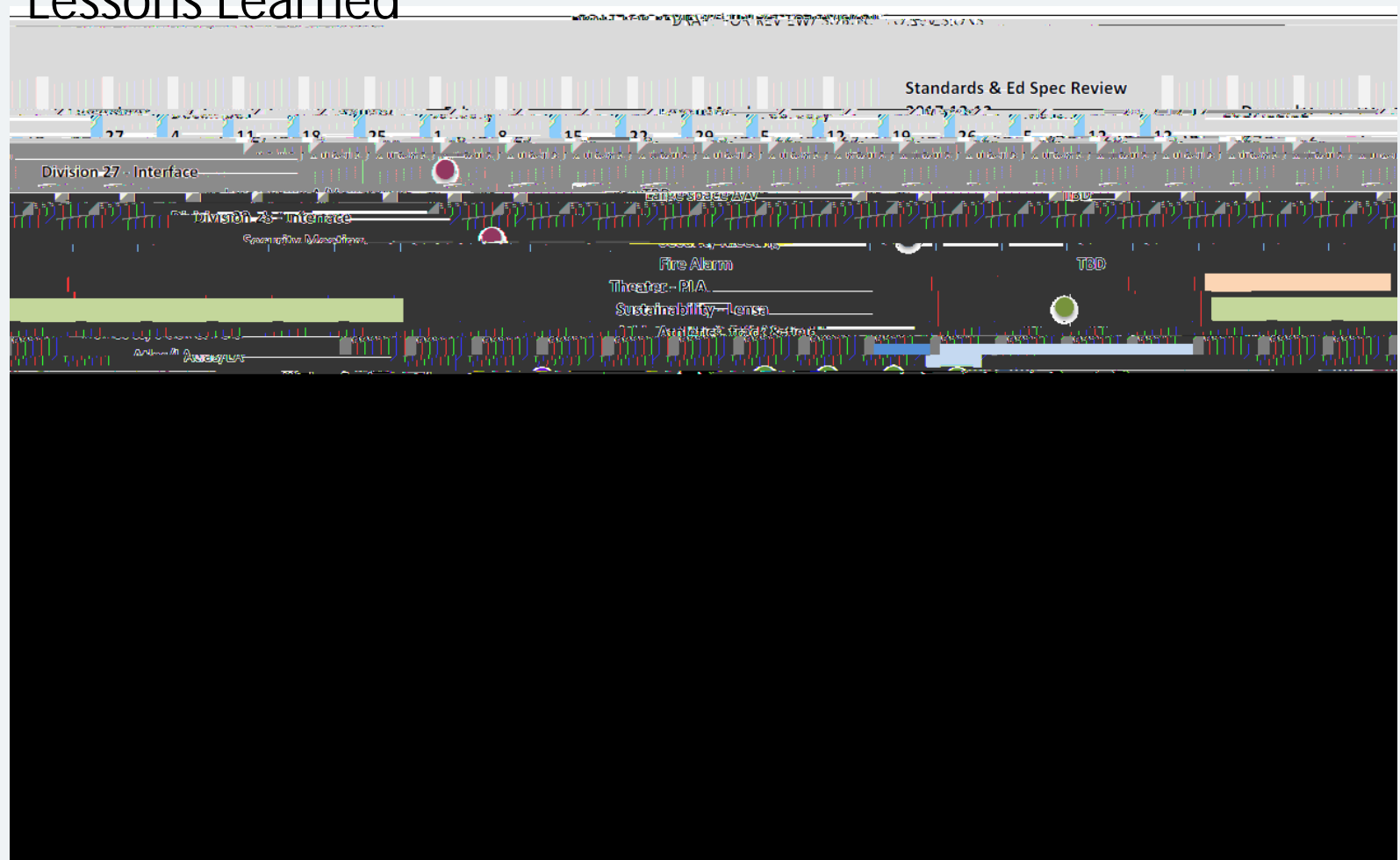
Lessons Learned

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Program Update

Lessons Learned





Program Update

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Program Update

	ORIGINAL FUNDS	CURRENT FUNDS	SPENT TO DATE	BALANCE
2012 BOND PROCEEDS	482,000,000	541,134,220	391,233,823	149,900,397
2017 BOND PROCEEDS	790,000,000	791,205,755	1,452,328	789,753,427
OTHER	-	44,557,151	27,758,759	-
	1,272,000,000	1,376,897,126	420,444,910	939,653,824



Program Update

PROJECT - 2012	CURRENT FUNDS	CURRENT BUDGET	DELTA
2012 Bond Program	47,620,410	47,620,410	-
Debt Repayment	45,000,000	45,000,000	-
Educational Specification	275,168	275,168	-
Faubion Replacement	49,802,997	49,802,997	-
Franklin HS Modernization	113,322,686	113,322,686	-
Grant HS Modernization	140,786,805	150,786,805	10,000,000
Improvement Project 2013	11,963,139	11,963,139	-
Improvement Project 2014	17,811,788	17,811,788	-
Improvement Project 2015	13,623,142	13,623,142	-
Improvement Project 2015 - Maplewood	1,518,698	1,518,698	-
Improvement Project 2015 - SCI	2,057,686	2,057,687	1
Improvement Project 2016	16,390,783	16,390,783	-
Improvement Project 2017	10,155,309	10,155,309	-
Improvement Project 2018	-	-	-
Improvement Project 2019	-	-	-

TRACKING THE GRANT PROJECT "ADDITIONAL FUNDS"



Program Update

Project Name	Original Budget	Approved Budget Changes	Current Budget	Current Commitments	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
A	A	B	C (A + B)		E	F (E - C)	G
Franklin HS Modernization	81,585,655	31,737,031	113,322,686	112,945,579	113,500,000	177,314	111,179,062
Grant HS Modernization	88,336,829	62,449,976	150,786,805	130,933,759	150,786,805	-	23,973,178
Roosevelt HS Modernization	68,418,695	37,667,575	106,086,270	98,565,375	104,995,049	(1,091,221)	94,750,355
Roosevelt 7c	68,418,695						



Program Update








Project Name	Original Budget	Approved Budget Changes	Current Budget	Current Commitments	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
A	A	B	C (A + B)		E	F (E - C)	G
Lincoln HS Modernization	187,000,000	-	187,000,000	707,620	187,000,000	-	90,820
Kellogg Replacement	45,000,000	-	45,000,000	4,189,296	45,000,000	-	453,910
Madison HS Modernization	146,000,000	-	146,000,000	2,206,260	146,000,000	-	-
Benson HS Modernization	202,000,000	-	202,000,000	279,919	202,000,500	500	75,384

2017 COST SUMMARIES:

- UNALLOCATED H&S BUDGET NOTED IN "2017 BOND PROGRAM" PROJECT
- H&S BUDGET TRANSFER TO GROUP PROJECTS
- H&S MANAGEMENT BUDGET TRANSFER
- BOND PREMIUM ADDED



Program Update



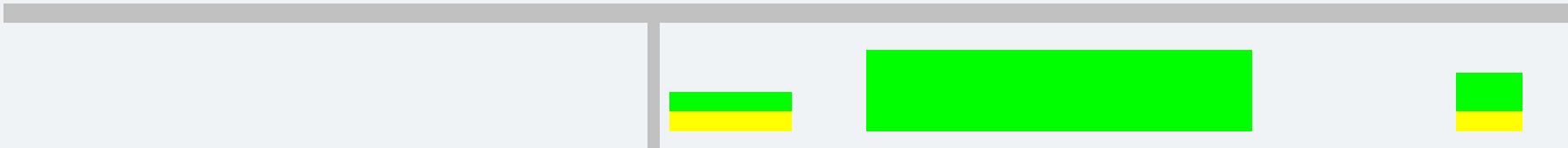
Program Update

Equity Perspective

- Memo: Student Engagement Highlights 2017
- Certified Business Data Disaggregated by Ownership Type:
 - Minority Business Enterprise (MBE): 15%
 - Women Business Enterprise (WBE): 65%
 - Service-Disable Veteran Business (SDVBE): 0%
 - Emerging Small Business (ESB): 20%

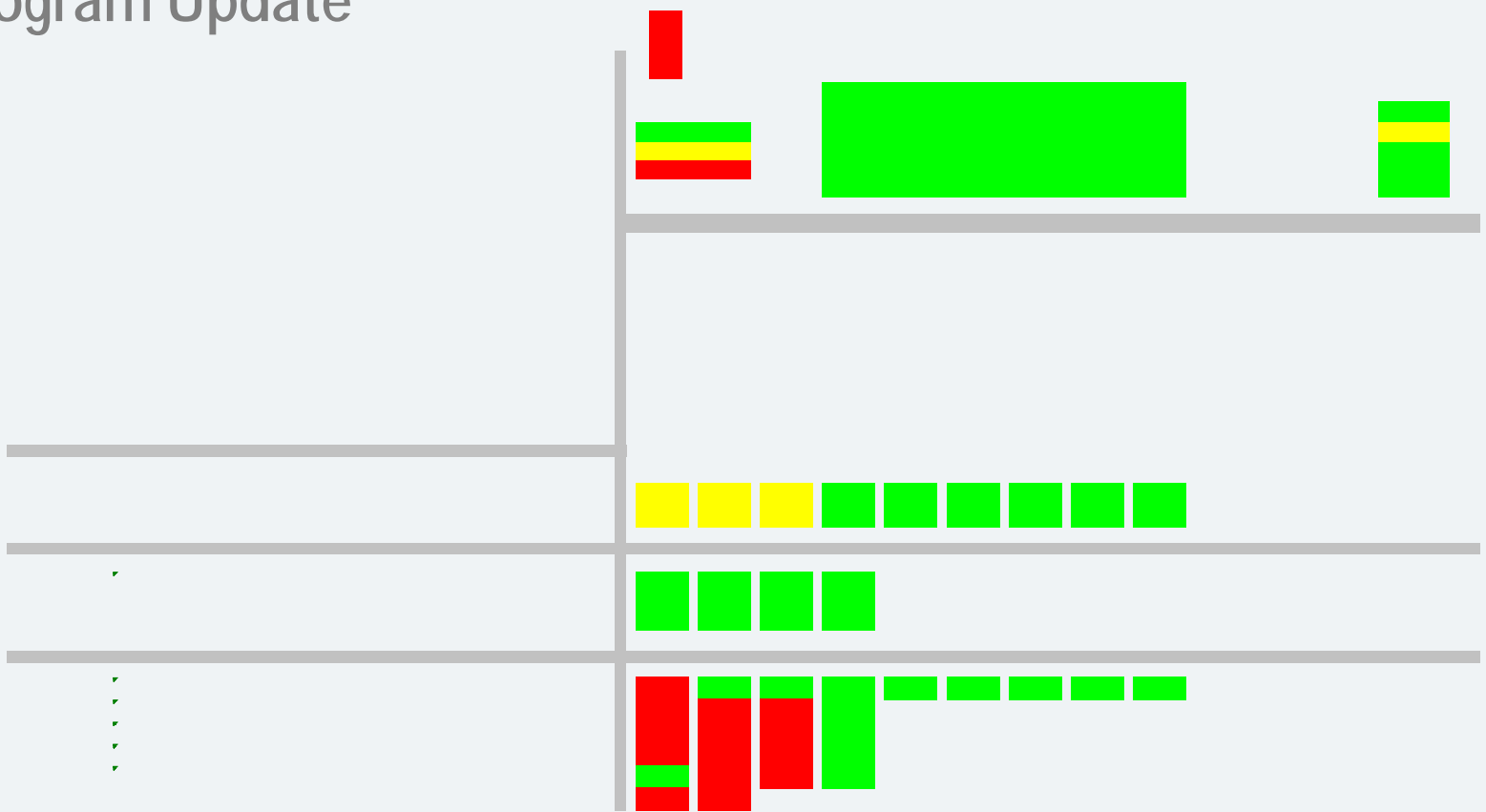


Program Update





Program Update





Project Updates

2012 Bond Projects

- Roosevelt High School
- Grant High School
- Faubion – in closeout
- Franklin – in closeout

2017 Bond Projects

- Kellogg Middle School
- Madison High School
- Lincoln High School
- Benson Technical School
- Health and Safety Projects



Roosevelt HS Modernization

SCHOOL BUILDING IMPROVEMENT BOND

SCHOOL BUILDING IMPROVEMENT BOND

Accomplishments

Photos

‰ HVAC systems completed

‰ Commissioning underway

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Remaining Work

Phase 3:

‰ Finish fields/dug outs by 3/1/18

‰ Landscaping/childcare outdoor area by 1/30/18

Phase 4:

‰ Manage Land Use follow up actions

‰ Submit Bldg Permits

‰ Contractor decision – LCL or other



Grant HS Modernization

Accomplishments

- ‰ GMP amendment executed
- ‰ All construction procurements are now complete
- ‰ Additional funding (\$4M) approved by BOE
- ‰ All mass demolition is now complete
- ‰ Demolition/abatement operations are slowing down – team transitioning to structural development

Next Steps

- ‰ Significant headway into structural

Challenges & Opportunities



Grant HS Modernization

THE BOARD OF SUPERVISORS COUNTY OF SANTA CLARA SCHOOL BUILDING IMPROVEMENT BOND





Grant HS Modernization

THE BOARD OF SCHOOL BUILDING IMPROVEMENT BOND





Grant HS Modernization

SCHOOL BUILDING IMPROVEMENT BOND





Project Updates

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Kellogg MS Replacement

Accomplishments

Next Steps

Challenges & Opportunities

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Madison HS Modernization

Accomplishments

- ‰ CM/GC RFP is active
- ‰ Industry outreach associated with RFP
- ‰ Steering Committee and DAG groups underway

Next Steps

- ‰ CM/GC RFP solicitation
- ‰ Master Plan approval by BOE
- ‰ Start SDs
- ‰ Engagement with DAG, stakeholders and Steering Committee

Challenges & Opportunities

- ‰ Structural reinforcement requirements – FLS vs. IO
 - ‰ Level and extent of application
- ‰ Timelines for decision making to avoid schedule impacts
 - ‰ Schedule delays may impact use of Marshall campus



Lincoln HS Replacement

Accomplishments

- ‰ Steering Committee/DAG engaged
- ‰ Continuation of Master Planning efforts
- ‰ Industry outreach for contractor selection

Next Steps

- ‰ Publish CM/GC procurement
- ‰ Master Plan approval by BOE
- ‰ DAG and Steering Committee presentations
- ‰ Initiate Schematic Design

Challenges & Opportunities

- ‰ Land Use Approval – Unique overlay district
- ‰ Build Permits – complexity of facility
- ‰ Tight site constraints – urban setting
- ‰ High-rise facility



Benson HS Replacement

Accomplishments

- ‰ Industry outreach efforts continue
- ‰ Continuation of Programming / Master Planning efforts

Next Steps

- ‰ Ed Spec approval by BOE ~ summer/fall
- ‰ Master Plan approval by BOE ~ fall
- ‰ DAG Committee formation ~ fall
- ‰ Alternative Procurement approval by BOE ~ summer
- ‰ CMGC Procurement ~ fall / winter

Challenges & Opportunities

- ‰ Land Use Approval & Historic Review
- ‰ Occupied Site
- ‰ Build Permits – multi-phased
- ‰ Tight site constraints – urban setting
- ‰ Relocation of existing programs to be determined



Benson HS Replacement

THE BOARD OF SUPERVISORS SCHOOL BUILDING IMPROVEMENT BOND

Schedule Info

- ‰ CM/GC RFP: Sept – Dec 2018
- ‰ Design Starts: Winter 2018
- ‰ Land Use Approval: Fall 2019
- ‰ Design Complete: Spring 2021
- ‰ Building Permits Received: Winter 2020
- ‰ Start of Construction: Summer 2021
- ‰ Substantial Completion: Winter 2024



Accomplishments

- ‰ Continuation of water fixture replacement
- ‰ Design team awards for upcoming work
- ‰ DRAFT H&S Execution Plan
- ‰ DRAFT Paint project delivery plan
- ‰ Development of consolidated scope/budget matrix

Next Steps

- ‰ Assignment of scopes to bidding windows
- ‰ Prioritization of future scope of work

Challenges & Opportunities

- ‰ Bid competition for upcoming work
- ‰ Hiring staff to manage scope



HEALTH & SAFETY

- IMMEDIATE WORK
 - Managed by FAM
 - Largely small projects completed by FAM (know as “Group 1”). Plus water fixture replacement, lead paint remediation and Tubman roof.
 - Scope intended to be reimburse with Bond funds
- MIDDLE SCHOOL CONVERSION
 - Managed by FAM
 - Portions of scope funded with Bond funds
- INTERMEDIATE WORK
 - Managed by OSM
 - Scope includes roofs, fire alarms/sprinklers, accessibility and asbestos abatement
 - Currently in design. Construction to begin (largely) in Summer 2018.
- LONG-TERM PLAN
 - Managed by OSM
 - Process underway to identify scope priorities for all H&S categories

Health & Safety Group 2

- 7 Schools
- Currently in Design
- Timeline
 - Apply for Permits: April 2018
 - Issue ITB: April 2018
 - Bids Due: April 2018
 - Contractor Training May 2018
 - Issue NTB: May 2018
 - Construction Phase: June 2018

SITES	Sprinkler	Fire Alarm
Ainsworth Annex		X
DaVinci	X	X
Green Thumb		X
Jefferson	X	
Lee	X	X
Maplewood	X	X
West Sylvan		X



Health & Safety Group 4

- Asbestos Abatement and build back
- Currently in Design
- Current Bid Strategy:
 - Utilize existing abatement master contracts (6)
 - Tubman to start as early as March

SITES	ASBESTOS
Beaumont	X
Ockley Green	X
Vernon	X
Chapman	X
Tubman	X
Jefferson	X
Holladay Annex	X
Jackson HS	X
Rice Elem.	X



BAC Discussion

Questions

Next Board Presentation

Tuesday, February 13

Tuesday, February 29

Next BAC Meeting

Date: Wednesday, April 19

Place: ??