



PLANNING YOUR SCHOOL BUILDING PROJECT: Putting the Pieces Together

2007-2008 Edition



Planning Your School Building Project

Putting the Pieces Together

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Contents

Introduction & Foreword

- **Introduction**
- **Staff Contacts** (*A listing of key OSFC personnel and their duties*)
- **Overview** (*A summary of the OSFC Program Delivery model*)
- **Timeline** (*A look at how all the different processes fit together*)
- **Glossary** (*Key terminology used in the construction industry and by the OSFC*)

Pre-Planning

- **Overview** (*An excerpt from the Ohio School Design Manual on the pre-planning phase*)
- **Educational Planning** (*Concepts to review prior to embarking on a facilities project*)
- **Community Engagement** (*Description of the assistance available to school districts for community outreach efforts*)
- **Public Records Requests** (*OSFC's policy on handling records requests*)
- **CFAP / ENP Frequently Asked Questions** (*Common questions regarding participation in these programs*)
- **ELPP to CFAP Transition** (*Common questions regarding the move from ELPP to CFAP*)
- **Selecting an Architect** (*A guide to compliance with Ohio's design professional selection law*)

Planning / Approval / Funding

- **Master Planning Activities** (A look at the Planning Process and its participants)
- **Overview** (*An excerpt from the Ohio School Design Manual on the planning phase*)
- **Assessments and Cost Guidelines** (Summarizes the procedure for conducting facility assessments and setting projected costs)
- **Enrollment Projections** (*Ohio School Design Manual overview of the enrollment projection process*)
- **Funding Parameters** (*Funded and non-funded items*)
- **Renovation vs. New Construction** (*Factors to think about when considering whether or not to renovate*)
- **2/3rds Guideline / 350 Law** (*Definition and application of these issues*)
- **The Program of Requirements** (*Excerpt from the Ohio School Design Manual*)
- **Excess Square Footage** (How excess area and LFI costs are calculated)
- **Property Acquisition** (*Guidance for obtaining school sites*)
- **Site Planning** (Best practices for evaluating and selecting a school site)

Contracting

- **Overview of the Contracting Phase** (*An excerpt from the Ohio School Design Manual on the contracting phase*)
- **Role of the Project Administrator** (*Summary of responsibilities of the OSFC project administrator*)
- **Project Contracting Structure** (*Flow chart showing the structure of the contracting process*)
- **Financial Reporting** (*Memo with guidance to districts on the project reporting requirements*)
- **Partnering** (*A brief overview of the partnering requirement*)
- **Construction Management** (*Definition and role of the construction management firm*)
- **CM Selection** (*A chart illustrating the process*) / Sample CM Selection Forms

Design

- **Design Phase Overview** (*An excerpt from the Ohio School Design Manual on the design phase*)
- **OSDM organization** (*An overview of the Ohio School Design Manual*)
- **Phase submission and typical submission errors** (*Requirements for the submission of schematic design documents*)
- **Bracketing** (*Samples of how “bracketing” works in the planning and design of facilities*)
- **Special Needs Design** (*Ohio School Design Manual allocations for special needs students*)
- **21st Century Design** (*A brief summary of options to consider when designing your facilities*)
- **OSDM Tolerance Policy** (*Policy illustrating areas of flexibility in the design manual*)
- **Class Size** (*The method used for determining the number of “teaching stations” within a building*)
- **Design Variance** (*How to request a variance and a flowchart on the decision-making process*)
- **Standards for Specifications** (*Policy on the development of specifications used in bids*)
- **Building Energy Use and the OSFC Green Buildings Initiative** (*Information on the effect of a new building on your operating budget and LEED for Schools*)
- **Technology Phase Submission and Budget** (*Information on the technology portions of the project budget*)
- **Phase Submission Form** (*Cover form for design submissions*)

Bidding

- **Bidding Phase Overview** (*An excerpt from the Ohio School Design Manual on the bidding phase*)
- **Project Responsibility Chart** (*Chart illustrating OSFC and school district responsibilities*)
- **Bid Process** (*Flowchart and information on the competitive bidding process*)
- **Responsible Bidder Criteria** (*Authorizing resolution and model criteria for districts wishing to adopt responsible bidder criteria*)
- **EDGE Certification** (*Information on the state’s Encouraging Diversity, Growth and Equity Program*)

- **Bidder Evaluation** (*Flowchart depicting the process by which are accepted or rejected*)
- **Certification of Contract Requirements** (*Form verifying the bidder has met all qualifications for the contract award*)
- **Drug Free Workplace** (*Memorandum regarding the requirements of a drug-free workplace program*)
- **Furniture** (*Policy memo on the method of procuring loose furnishings for a project*)

Construction

- **Construction Overview** (*An excerpt from the Ohio School Design Manual on the construction phase*)
- **Project Scheduling** (*Policy regarding the establishment of a project schedule*)
- **Project Budget** (*The policy on establishing a project budget*)
- **Budget Increases** (*Chart showing the impact of budget adjustments on the state and local shares*)
- **CM Tangible Property** (*Policy on the requirement of an inventory of all reimbursable tangible-personal property*)
- **Change Orders** (*Process by which change orders are submitted for approval*)
- **Retainage Escrow** (*Policy on the project escrow account*)
- **CM Status Report / Instructions / Key**

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- **Occupancy Overview** (*An excerpt from the Ohio School Design Manual on the occupancy phase*)
- **Final Inspection** (*Certification of the final inspection of a contractor's work*)
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- **Commissioning Agreement** (*A sample contract*)
- **Commissioning Guidelines** (*OSFC program requirements*)
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- **Post-Occupancy Overview** (*An excerpt from the Ohio School Design Manual on the occupancy phase*)
- **Warranty** (*Certification of the beginning of the warranty period*)
- **Evaluations** (*Sample evaluations forms*)
- **Close-out Policy and Binder Checklist** (*OSFC procedures for the closing of a project*)
- **Maintenance Program Information Guide** (*Detailed packet of policies and forms associated with the program*)
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Appendix

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