



# Capital Projects Workshop

NYSCOSS Mid-Winter Conference  
January 2009



*Imagine*



*Create*

## Moderator:

Dr. Donald B. Trombley, VP/Educational Consultant, Bovis Lend Lease LMB, Inc.

## Panelists:

- Garry Herbert, VP/Project Executive, Bovis Lend Lease LMB, Inc.
- Jim King, Principal, King & King Architects
- Mike Shusda, Asst. Superintendent for Management Services  
Baldwinsville CSD

## **As the CSO:**

- **It is expected that your school will operate and deliver educational excellence for the community every day.**
- **All stakeholders assume that you will marshal intelligent and expert advice to guide the process.**
- **Already having a fulltime job, you must design a communication and management plan that best meets the needs of your leadership and the school district. The size of your central office staff will, in part, determine the protocol for your approach to this plan. To fully construct an appropriate building management plan you need to have an entire project team assembled.**
- **5 yr plan status – congruent w/ the project.**

Before it all....



## First things first!

**Establish your team from day one.**

**Every capital project needs these components:**

- **Architect**
- **Construction Manager**
- **Fiscal Advisor**
- **Bond Counsel**
- **General Counsel**

**This team will interact smoothly and appropriately to the benefit of your project**

## Your team will help to pass the vote!

### Your Architect will:

- Establish scope of work
- Build consensus
- Maximize aid
- Lead/liaison with SED
- Public relations planning

## Your team will help to pass the vote!

### Your Construction Manager will:

- With Architect, establish project cost for referendum
- Breakdown project cost by buildings/additions/renovations/EXCEL
- Develop pre-referendum schedule
- Develop phasing plan; how will the school and construction co-exist



# Pre-referendum Timeline (Potential) – Getting to YES!



97% Success rate!

Jan 2009	District Architect provide existing building assessment to the District
Jan 2009	Bovis Lend Lease is selected as the Construction Manager
Feb 2009	District Architect submit SEQRA paperwork
Feb 2009	District Architect develops schematic design for buildings meeting w/Faculty & Administration
March 2009	District Architect reviews Design Concepts w/ the school Administration & Bovis Lend Lease
March 2009	Bovis Lend Lease and District Architect develop costs estimates and phasing
April 2009	Building Aid calculations / tax impact (confirmed w/fiscal advisor)
April 2009	Bovis Lend Lease & District Architect review proposed design and budget w/ BOE
April 2009	NYSED "Preliminary Review" to confirm aid
May 2009	BOE accepts SEQRA results – Adopts resolution for public referendum June 2008
May 2009	Bovis Lend Lease & District develop public information strategy
May/June 2009	Public Information Meetings <b>JUNE 2009 PUBLIC VOTE</b>



## **Your team will help to pass the vote!**

**Your Fiscal Advisor will:**

- **Provide accurate estimates of debt service and state building aid**

## **Your team will help to pass the vote!**

**Your Bond Counsel and General Counsel will:**

- **Prepare the SEQRA and bond vote resolutions in a manner to meet all legal requirements to provide maximum flexibility**

**Congratulations!**

**Your vote has passed!**

**What happens now?**

## **Your Architect's role:**

- **Design refinement**
- **Construction documents**
- **SED liaison/paperwork/submission**
- **SED approval/building permit**
- **Bidding/Evaluation**
- **5 yr plan needs to be updated**

## Your Construction Manager's role:

*“Have we met the benchmarks on aid estimates?”*

*“Must we adjust the scope to meet the aid?”*

- Investigate / examine conditions of existing facilities
- Provide multiple cost estimates (2-3) and review aid estimates / expectations
- Develop bid strategy
- Develop phasing and logistics plans for bidding and SED review

## **Your Fiscal Advisor's role:**

- **Develop the financing plan.**
- **Begin data collection for the issuance of bonds and notes.**

## **Your Bond Counsel's role:**

- Provide the bond resolution for the Board of Education

## **Your General Counsel's role:**

- Review ALL bid documents to ensure the contracts protect the interests of the District and are written to deliver what was expected and paid for

**It's time to “get underway”, “in the ground”, or “start”**

**What happens now.....??**

## **Your Architect's role:**

- **Design interpretation**
- **Submittals**
- **Field observation**
- **SED requirements**
- **Contract administration**
- **Public relations**

## **Your Construction Manager's role:**

- **KEEP SCHOOL OPEN!**
- **Move management**
- **Problem prevention**
- **Manage time, cost & quality**
- **Provide periodic updates, as requested, to BOE**
- **On-site, full-time, supervision of construction, contractors, and school**

## **Your General Counsel's role:**

- **Advise course of action in disputes**

## **Your Fiscal Advisor's and Bond Counsel's role:**

- **Conduct sale of serial bonds / notes according to financing plan**

## **Your Fiscal Advisor's role:**

- **Will track expenses & monitor state aid process**

**Major construction is complete.**

**Spaces and facilities are being used and occupied.**

**What happens now.....?**

## **Your Architect's role:**

- **Punch list**
- **Project closeout**
- **Follow up**
- **Continuing service**
- **Process starts again**
- **Long term relationship**

## **Your Construction Manager's role:**

- **With Architect & District, develop the punch list**
- **Establish final contract values for each contractor**
- **Provide an 11-month inspection**
- **Educate & train District personnel of new facilities & systems**
- **Ensure punch list items are finished and complete**

## **Your Fiscal Advisor's role:**

- **Assist with preparation of Final Building Project Report**

## **Your General Counsel's role:**

- **Assist with any issues during the close-out**

# The End



**It's all over...**

**This should be an enjoyable, proud time for you, the faculty, staff, and students.**

**The information provided today should be your guide for your next capital project to ensure the end result is a success you wish to be associated with.**

Thank you



**Thank you and good luck!**