



long  
beach  
unified  
school  
district

BUILDING ON SUCCESS - SCHOOLS FOR THE NEXT GENERATION

# MEASURE K BOND PROGRAM



## Long Beach Unified School District Board Workshop

### Facilities Update



August 16, 2010



# Table of Contents

	Page
Implementation Update	1
Program Management Planning Program Accounting and Financials Project Support Project Execution	
Current Projects Update	6
Project Development Update	9
Master Program Schedule Update	15
Master Program Budget Update	16
Master Program Budget Program Expenses New 6-8 Middle School #1 (GTE Site) New High School #1 (ECATS) Roosevelt Elementary School Jordan High School Cabrillo High School Pool New High School #2 (Browning)	
Facility Master Plan Review	40
Facilities Statistics, Lessons Learned, Program Successes	45

Please Note

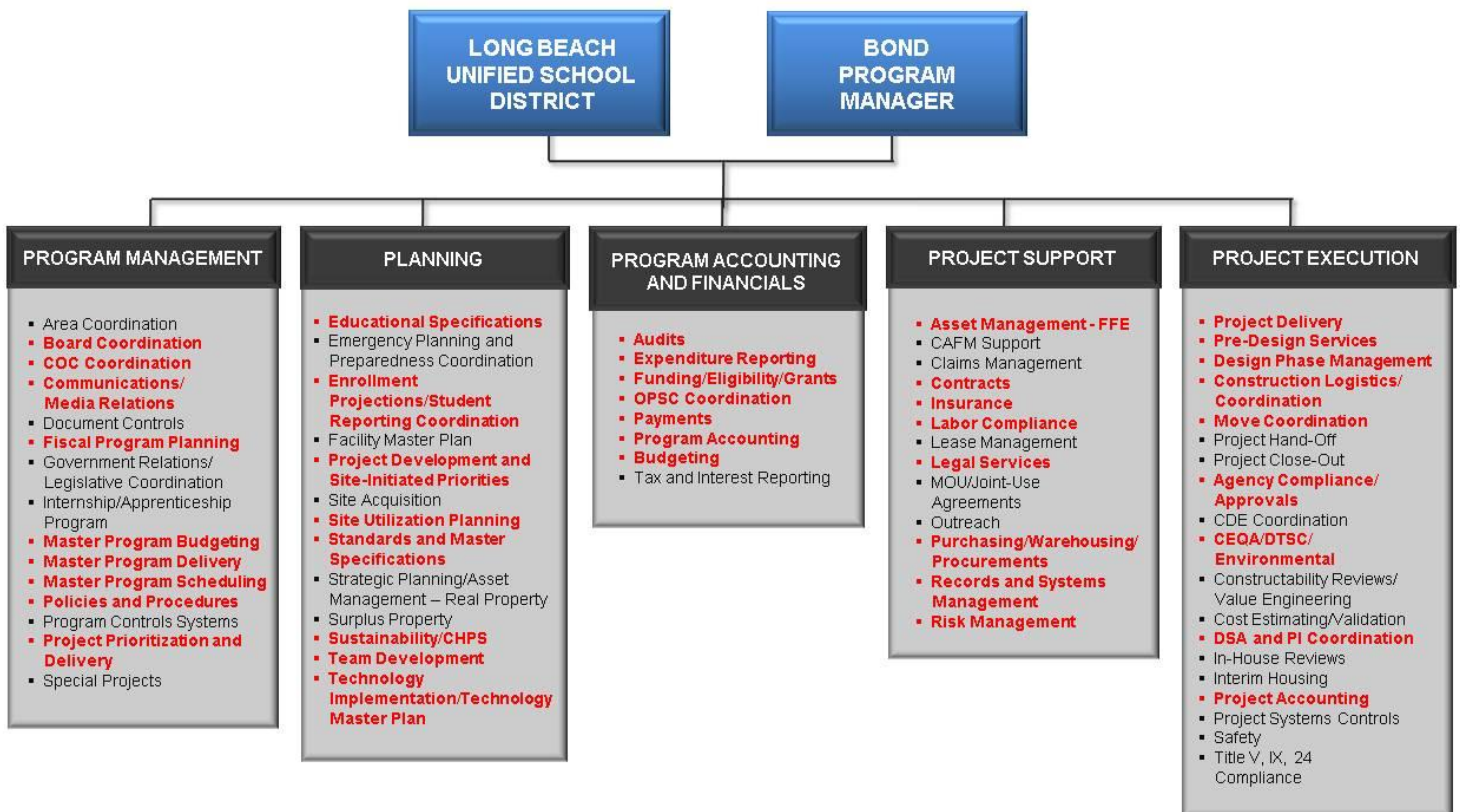
Information in this Workbook is supplemental to the PowerPoint Presentation.

---

# Implementation Update

Reporting Period  
December 2009 through July 2010

Early in the Program, the following Measure K Bond Program Structure was developed and remains current. It represents the areas of possible activity across all aspects of the Program. During this reporting period, the red highlighted components are the primary areas of work effort. Over the next several pages of this Workbook, key activities within these components are summarized.



## Program Management

### Board Coordination

- December 2009 Workshop Presentation and Workbook
- March 2010 Workshop Sustainability Presentation and Measure K Bond Program Update

### Communications/Media Relations

- Communications Coordinator RFP Issued and Recommendation for Selection Made
- Assistance with Community Meetings

### Fiscal Program Planning

- Cash Flow Analyses Reviewed and Provided as Needed
- Funding Analysis and Review of All Funding Sources (primarily State funding)

### Master Program Budgeting

- Master Program Budget Updated in Response to New Major Project and District-Wide Project Development

### Master Program Delivery

- New Consultant Team Member Orientation Packet Developed and Trainings Conducted
- High School Planning Continued with Curriculum and Academic Planning Staff

### Master Program Scheduling

- Incorporation of Major Projects and District-Wide Projects
- Adjustments to Master Program Schedule as a Result of On-Going Project Activities

### Policies and Procedures

- Approximately 100 Policies, Procedures, Processes Identified for Development
- Approximately 25 Policies, Procedures, Processes In Development
- Approximately 10 Policies, Procedures, Processes Completed and Implemented
- RFQ/SOQ/RFP Processes for Major Projects Developed and Implemented on First Round of Major Projects
- District-Wide Lottery and Selection Processes/Procedures Developed and Implemented on First of the District-Wide Projects



### Project Prioritization and Delivery

- Major Project Delivery Methods Identified for First Round Major Projects
- Newcomb K-8 Academy Identified as First AB300 Project
- District-Wide Project Sites Identified for Initial Projects and Work Prioritized

## Planning

### Enrollment Projections/Student Reporting Coordination

- Continued Planning for DOH (Department of Housing) Removal and Phase II of Deportablization Program

### Project Development and Site Initiated Priorities

- Major Projects and District-Wide Projects Site Information Collection and Organization for Design Teams
- Major Projects Due Diligence Activities

### Site Utilization Planning

- Enrollment
- Capacity
- Use

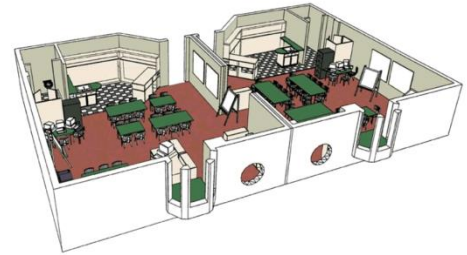
### Standards and Master Specifications (including Educational Specifications and Sustainability/CHPS)

Standards Development continues across several platforms.

- New High School #1 (ECATS)
  - Technology (energy management systems, phone systems, structured cabling, security systems)
  - Roofing (low sloped and pitched)
  - Doors and Hardware (metal and wood doors and door hardware)
  - Flooring (gym wood, linoleum, rubber and carpeting)
  - Painting
  - Plumbing Fixtures



- Landscaping and Irrigation
- AC Paving
- Marquee Signs
- Windows (new construction)
- 2010 District-Wide Small Projects
  - Replacement Ceilings
  - Windows (retrofit)
  - Boilers
  - Interior Lighting
  - Others, as needed
- Classroom Technology Standards In Development
- Educational Design Standards Being Completed
- Selection of Architectural Design Team to Complete in Process
- Photovoltaics at New High School #1 (ECATS)



#### Team Development

- 7 Staff Training Sessions
- 2 Architectural Team Orientations on District-Wide Projects

#### Technology Implementation Planning/Technology Master Plan

- Telecommunications Analysis and Low Voltage Assessments in Process

## Program Accounting and Financials

#### Expenditure Reporting

- COC Quarterly Reports – December, April and June

#### Funding/Eligibility/Grants

*(subject to change dependent upon funding availability)*

- Eligibility – Modernization Funds (60%/40%)

Jordan	State Share	\$ 22.44M
	Required District Match	\$ 14.96M
Roosevelt	State Share	\$ 1.59M
	Required District Match	\$ 1.06M



Newcomb	State Share	\$ 3.93M
	Required District Match	\$ 2.62M

- Eligibility – Overcrowded Relief Grant (ORG) Funds (50%/50%)

Jordan	State Share	\$ 10.16M
	Required District Match	\$ 10.16M

Roosevelt	State Share	\$ 6.99M
	Required District Match	\$ 6.99M

Newcomb	State Share	\$ 3.93M
	Required District Match	\$ 2.62M

- State-Wide Bond Would Be Beneficial to the District

#### Program and Project Accounting

- Enhanced Budget Development Implementation with Staff Training and Tools (ie. conceptual design, estimate updates)
- Project/Program Funding and Internal Work Flow Processes Continue along with Development of Forms and Tools for Use/Implementation (ie. budget development worksheet)
- Report Formats Continue to be Developed to Support Project Managers and District Staff Work Efforts, as well as Colbi Technologies Implementation
- On-going Monthly and Quarterly Reporting, Data Input and Verification of Master Program Budget and Project Budgets
- On-going Monthly Accounting Reconciliation
- Report Development and Production
- Fiscal Year-end Balancing
- 2008/2009 Measure K Annual Financial Audit Review
- Annual Fiscal Reconciliation



#### Budgeting

- Cash Flow Reports Updated Regularly

## Project Support

### Asset Management – FFE

- Move-Out of DeMille Middle School for Construction of New High School #1 (ECATS)

### Contracts

#### Across Both Project-Specific Contracts and Agreements and Boilerplate Documents

- Lease-Leaseback – Pre-Construction Services, Site Lease, Construction Services Agreement, Sub-Lease
- (Integrated Project Delivery (IPD) Exhibit for Both Architectural and Builder Entity
- Short Form Phase 1 Architectural Services Agreement for Both Standard Design-Bid-Build and Lease-Leaseback Delivery Methods
- Professional Consultant Services Agreement
- Front-End Document Review for Both Standard Design-Bid-Build and Lease-Leaseback Delivery Methods



### Insurance and Risk Management

- OCIP Feasibility Study Underway

### Labor Compliance

- Review of New Regulations and Implementation

### Purchasing/Warehousing/Procurements

#### Following are Procurements from this Reporting Period:

- 2009/2010 Measure K Performance and Financial Auditors Selected
- 2010 ADA (Americans with Disabilities Act) On-Call Professional Architectural Services
- Project Management RFQ
- Communications Coordinator RFP



- Major Project Architectural Services
  - Roosevelt Elementary School
  - Newcomb Elementary School
  - Jordan High School
  - Cabrillo High School - Pool
  - New High School #2 (Browning)
  
- District-Wide Projects
  - Phase I DOH Removal Project
  - Boiler Replacement Project
  
- Existing Consultant Qualification Categories
  - Architectural Pool
  - Surveying Pool
  - Testing and Inspection Pool
  - California Environmental Quality Act (CEQA) Pool
  - Geotechnical Pool
  - Traffic Pool
  - Cost Estimators Pool
  - Division of State Architect (DSA) Project Inspector (PI) Pool

## Project Execution

Work Efforts across Major and District-Wide Projects During this Reporting Period:

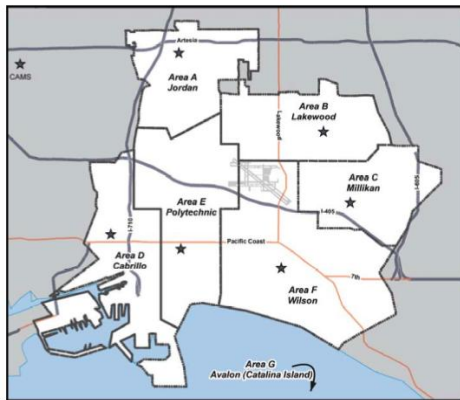
- Pre-Design Services
- Design Phase Management
- Construction Logistics/Coordination
- Move Coordination
- Agency Compliance/Approvals
- CEQA/DTSC/Environmental
- DSA and PI Coordination
- Project Accounting (*see Implementation Update, Program Accounting*)

# Current Projects Update

The PowerPoint Presentation provided summaries of all current projects. No supplemental information for this section is included in this Workbook.

# Project Development Update

## Future Major Projects



- Jordan High School (Area A)**
- Millikan High School (Area C)**
- Hill Middle School (Area F)**
- Roosevelt Elementary School (Area E)**
- New High School #2 at Browning Site (Area E)**
- Avalon K-12 (Area G)**
- Hamilton Middle School (Area A)**
- Bancroft Middle School (Area B)**
- Cabrillo High School – Pool (Area D)**

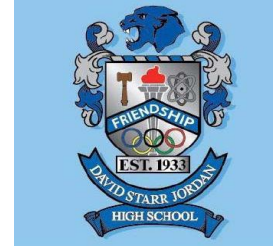
## Roosevelt Elementary School

- Complete Rebuild of 3.8 Acre School Site (64,000 SF)
- Current Enrollment – 1,040 students
- Projected Enrollment in 2015 – same (per Facility Master Plan)
- School Relocation During Construction Anticipated
- Pre-Design Activities Underway including Surveys
- Architect Selection Proceeding to Negotiations



## Jordan High School

- Major Modernization of 26.89 Acre School Site (301,663 SF permanent buildings, 31,680 SF portable structures)
- Current Enrollment – Jordan High School (2,890 students), Jordan Academy (805 students)
- Projected Enrollment in 2015 – Jordan High School (2,200 students), Jordan Academy (700 students) – per Facility Master Plan
- Six AB 300 Buildings (gym, auditorium, bleacher building, industrial occupation center, music and auto shop)
- Interim Housing During Construction On-Site Likely
- Pre-Design Activities Underway including Surveys
- Architect Selection Proceeding to Negotiations



## Cabrillo High School – Pool Addition

- Add Pool Facility and Associated Support Facilities at 62 Acre School Site (290,260 SF permanent buildings, 39,360 SF portable structures, 41,200 SF bungalow buildings)
- Current Enrollment – 3,340 students
- Projected Enrollment in 2015 – 3,000 students (per Facility Master Plan)
- Pool Location Needs to Address Access and Parking
- Programs to Remain On Site During Construction
- Pre-Design Activities Underway including Surveys
- Architect Selection Proceeding to Negotiations



## New High School #2 (Browning Site)

- State Site Approval Extension Studies in Progress
- CEQA and Traffic Reviews in Progress
- Review of Existing Site Approval Reports
- Architect Selection Proceeding to Negotiations

## District-Wide Projects

### AB 300 Buildings

#### Newcomb K-8 Academy

- Major Modernization of 13.5 Acre School Site (69,000SF – 4 permanent buildings and 12 relocatable structures)
- All Permanent Buildings on AB 300 Category 1 Building List
- Current Enrollment – 515 students
- Projected Enrollment in 2015 – 740 students (per Facility Master Plan)
- Pre-Design Activities Underway including Surveys
- Architect Selection Proceeding to Negotiations



#### Other Sites with AB 300 Buildings

*(bold indicates prioritized school in Measure K Bond Program planning)*

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• <b>Bancroft M.S.</b></li> <li>• Franklin M.S.</li> <li>• <b>Hamilton M.S.</b></li> <li>• <b>Hill M.S.</b></li> <li>• Hoover M.S.</li> <li>• Jefferson M.S.</li> <li>• <b>Jordan H.S.</b></li> <li>• Lakewood H.S.</li> <li>• Los Cerritos E.S.</li> </ul> | <ul style="list-style-type: none"> <li>• Lowell E.S.</li> <li>• <b>Millikan H.S.</b></li> <li>• Polytechnic H. S.</li> <li>• Renaissance H.S.</li> <li>• Rogers M.S.</li> <li>• Stephens M.S.</li> <li>• Whittier E.S.</li> <li>• Willard E.S.</li> <li>• Wilson H.S.</li> </ul> |
|--|--|

## Access Compliance



- 2010 ADA On-Call Professional Architectural Services (for as needed access compliance projects) – 3 firms selected
  - LPA Inc.
  - Westgroup Designs
  - Jubany NAC Architecture

## Facility Component Improvements

- Scope and Requests for Proposal (RFPs) Being Developed
  - Lighting and Ceiling Replacement Project
  - Window Replacement Project
  - Door and Door Hardware Repair and Replacement Project



## Deportablization

- Phase II Planning Begun

## DSA Certification and Close-Out

- Summary Status – Total of 366 Applications Identified
  - 132 Certified (Complete)
  - 29 at DSA for Certification
  - 198 Remaining
    - 4 Still Being Investigated
    - 125 Require Major Corrective Work (overlap with / portion of require post inspection)
    - 160 Require Post Inspection Work
    - 42 Remaining Applications Being Finalized for DSA Submission
  - 4 District Sites “Clear” – Addams E.S., Bancroft M.S., Jordan Academy and Twain E.S.
- Three Solicitations in Development
  - Architectural and Engineering Services RFP
  - DSA Project Inspector (PI) RFQ/RFP
  - Materials Testing and Inspections RFP
- Meeting with DSA Planned for Fall

## Pilot Projects

Underway:

- Grass and Irrigation Projects at New 6-8 Middle School #1 (GTE)
- Photovoltaics at New High School #1 (ECATS)
- Radio-Frequency Identification (RFID) Security for Libraries





## Technology Upgrades

### Components and Systems Included:

- Conducting Series of Meetings with District Staff and Project Teams
- Reviewing District Technology and Low Voltage Standards
- Pathway and Infrastructure
- Cabling
- EMS (Energy Management Systems)
- Security/Intrusion and Fire Protection/Alarm
- Telephone
- Wireless Access
- Intercom/Clock/Speaker
- Public Address (P.A.)
- Multimedia (Television/CATV – Community Access Television)
- Classroom Audio Visual
- Assistive Listening Devices
- Point of Sale



## Master Program Schedule Update

The PowerPoint Presentation provided Master Program Schedule update information. No supplemental information for this section is included in this Workbook.

# Master Program Budget Update

The following pages of the Workbook contain the full Master Program Budget and all current Project Budgets and associated reporting details.

- I. Master Program Budget
- II. Program Expenses
- III. New 6-8 Middle School #1 (GTE Site)
- IV. New High School #1 (ECATS)
- V. Roosevelt Elementary School
- VI. Jordan Elementary School
- VII. New High School #2 (Browning)
- VIII. Cabrillo High School Pool
- IX. AB300 Newcomb K-8 Academy

# Facility Master Plan Review

## Principles Review

- Creating Learning Environments to Meet Schools for the Next Generation
- Renovating and Replacing Aging Infrastructure
- Declining Enrollment and Elimination of Portables and Bungalows
- Changing the Size and Types of High Schools
- Joint Use
- School Safety and Security



## Community Advisory Committee Recommendations Review

1. Adopt Facility Master Plan as a Guide to Renovate and Replace
2. Student Needs and Academic Achievement High Priority Focus
3. Projects and Priorities List *from Executive Committee*
4. Phase Projects
5. Reduce or Eliminate Portables and Bungalows
6. Reduce Number of Students at Comprehensive High Schools and Establish Smaller Thematic High Schools
7. On-going Maintenance and Component Replacement
8. Develop Interim Housing Plan
9. Follow Sustainable Design Practices
10. Incorporate Green Space and Landscaping
11. Accomplish Projects in Timely Manner
12. Facilities Branch Develop Internal Capacity and Authorize Professional Services to Implement Facility Master Plan
13. Continue to Adjust Attendance Boundaries to Balance Enrollments and Optimize Operational Efficiencies
14. Approve Educational Specifications and Construction Standards
15. Update Facility Master Plan Every Five Years (January 2013)
16. Continually Involve Community in Planning and Implementation of Recommendations

## Four-Legged Stool



- Enrollment (*Assessed Yearly – i.e. K-1 and High School Spikes*)
- Conditions (*Maintenance Strategy to Sites in Groups 3 and 4*)
- Costs (*Re-Evaluated During Project Development*)
- Educational Program (*Confirmed during Project Scoping*)

# Facilities Statistics, Lessons Learned, Program Successes

## Lessons Learned

- Complete Constructability Review Prior to DSA Backcheck
- Delivery Method Impact on Contract Language, Team Selection, Builders
- When Possible Select Builders and Design Teams at Same Time
- Evaluate Value of Electronic Bidding and Impact on Bid Results
- Work with DSA Pro-Actively on Minor, Low Cost Projects to Facilitate Close-Out and Coordination with Other New Projects and Scope
- Templates and Standard Processes Work Well, Lead to Savings of Time and Money (like SOQs, letter templates, etc.)
- Develop Processes and Procedures that Can Reduce and Eliminate Bottlenecks and Slow-Downs
- Develop Relocatable Building Scope Checklist
- Provide Specialized Training for Team Members (ie. methane barrier installation)
- Address All Details (ie. sales tax application) in Procurement Processes
- Determine Standard Reporting for Specialized Consultants (ie. Certified Asbestos Consultants)
- Provide Third-Party Review of Constructability Reviews
- Develop N.O.C. (Notice of Completion) Procedures Addressing All Steps of Process

## Program Successes and Best Practices

Following is the list of Successes and Best Practices Prior to December 1, 2009:

- Program and Project Accounting Systems
- Measure A Expenditure Review and Reconciliation
- COC Training and Two Meetings
- COC Quarterly Financial Report
- Consultant Pre-Qualified Short Lists
- DSA Certification and Close-Out Program Activities
- Facility Master Plan Review
- Development and Implementation of Program Management Tools
- *(such as Board Action Item Summary and 90-Day Tracker, DSA Document Log, Meeting Records Form)*
- Routine and Regular Staff Trainings
- Updating of Program FAQs
- Development of Two Project Fact Sheets
- New 6-8 Middle School #1 DTSC Site Clearance
- New High School #1 – ECATS Submitted to DSA
- Value Engineering on New High School #1 – ECATS Project
- Constructability Review on New High School #1 – ECATS Project