Construction Delivery Methods

Measures B, J, and Y Independent Citizens' School Facilities Bond Oversight Committee

October 5, 2023

OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

CONSTRUCTION DELIVERY METHODS

October 5, 2023

CBOC

OAKLAND UNIFIED SCHOOL DISTRICT

expect Success

BRAILSFORD & DUNLAVEY

Design Bid Build

Lease-Leaseback

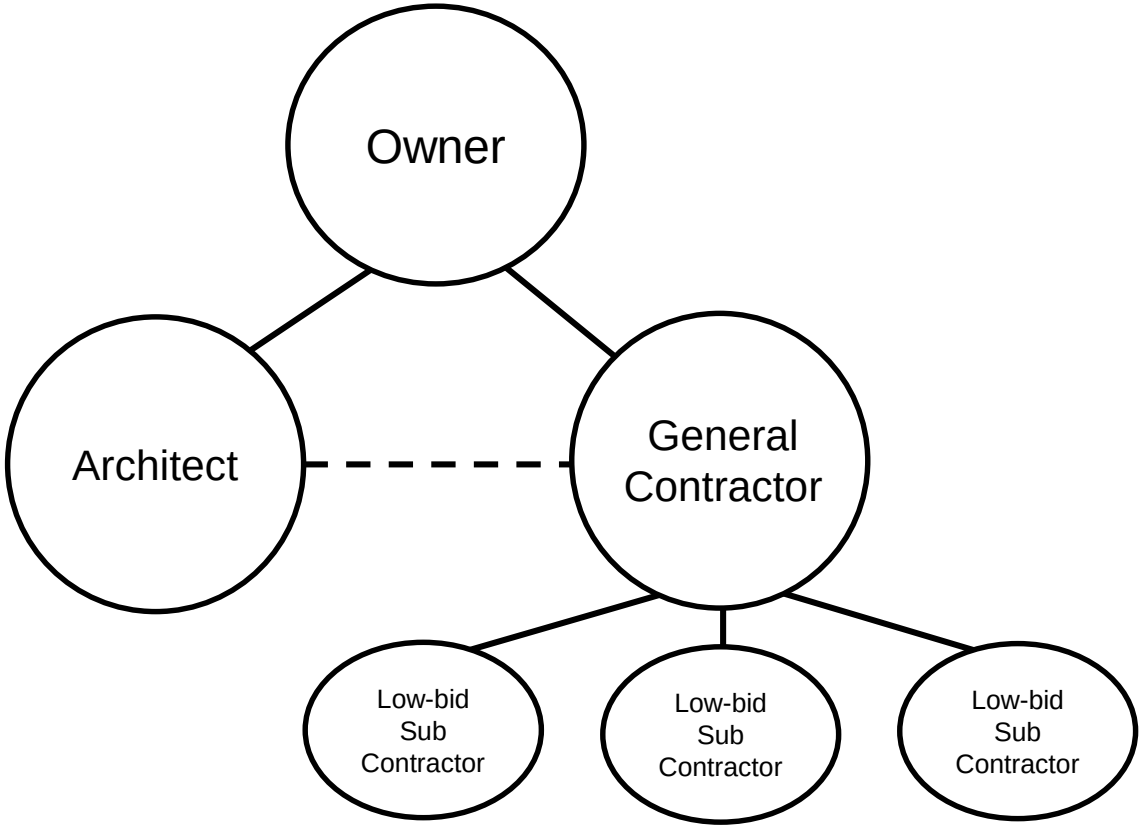
Design-Build

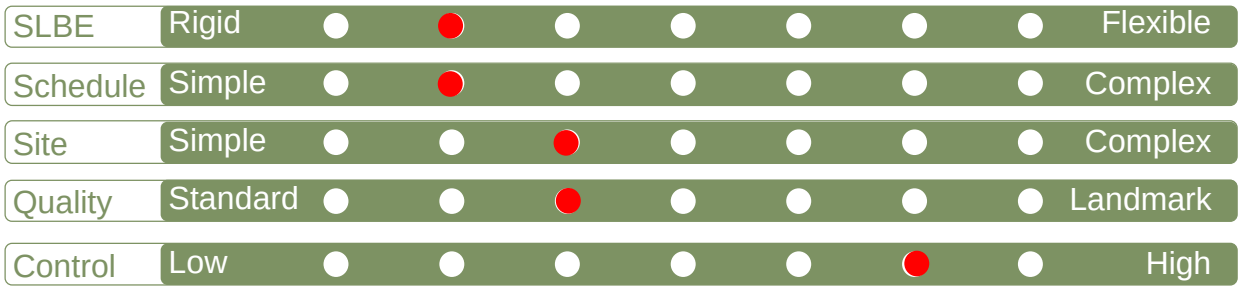
Design-Bid-Build

Under Design-Bid-Build, plans and specifications are completed by an architect and then advertised for bid. Contractors bid the project exactly as it is designed, and the project is awarded to the lowest responsive, responsible bidders. The design consultant team is selected separately and reports directly to the District. The District retains all of the contracts.

Design-Bid-Build

CONTRACT STRUCTURE





PROS

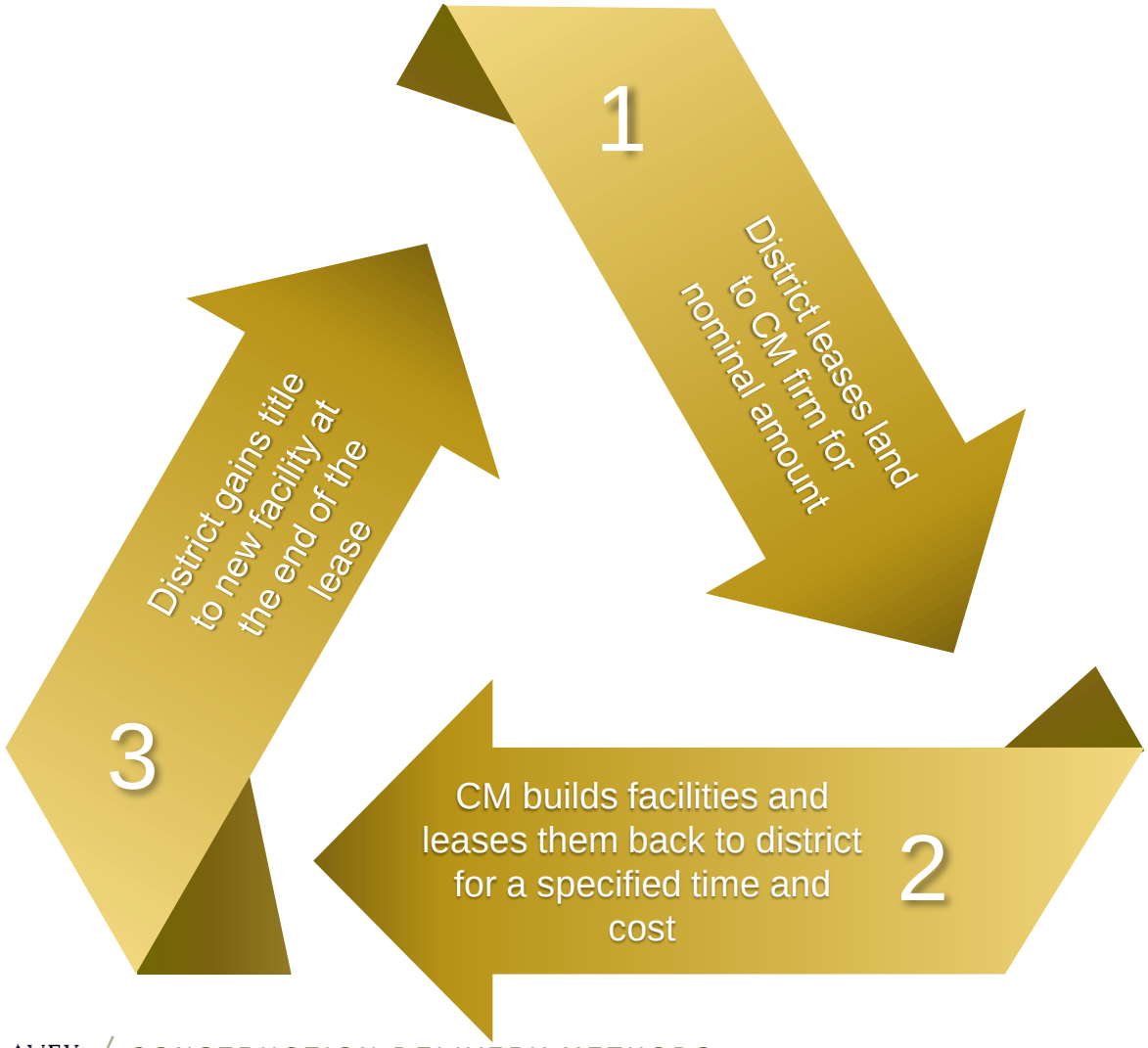
- Most common delivery method
- Owner maintains control of project through Design

CONS

- Sequential relationship between design, bidding, and construction can lengthen project schedule
- Must accept lowest bid for General and Sub contractors
- Cost overruns or schedule changes can create adversarial relationships between the owner, builder, and designer
- Greatest risk of general/subcontractor failure
- Greatest risk of schedule overrun

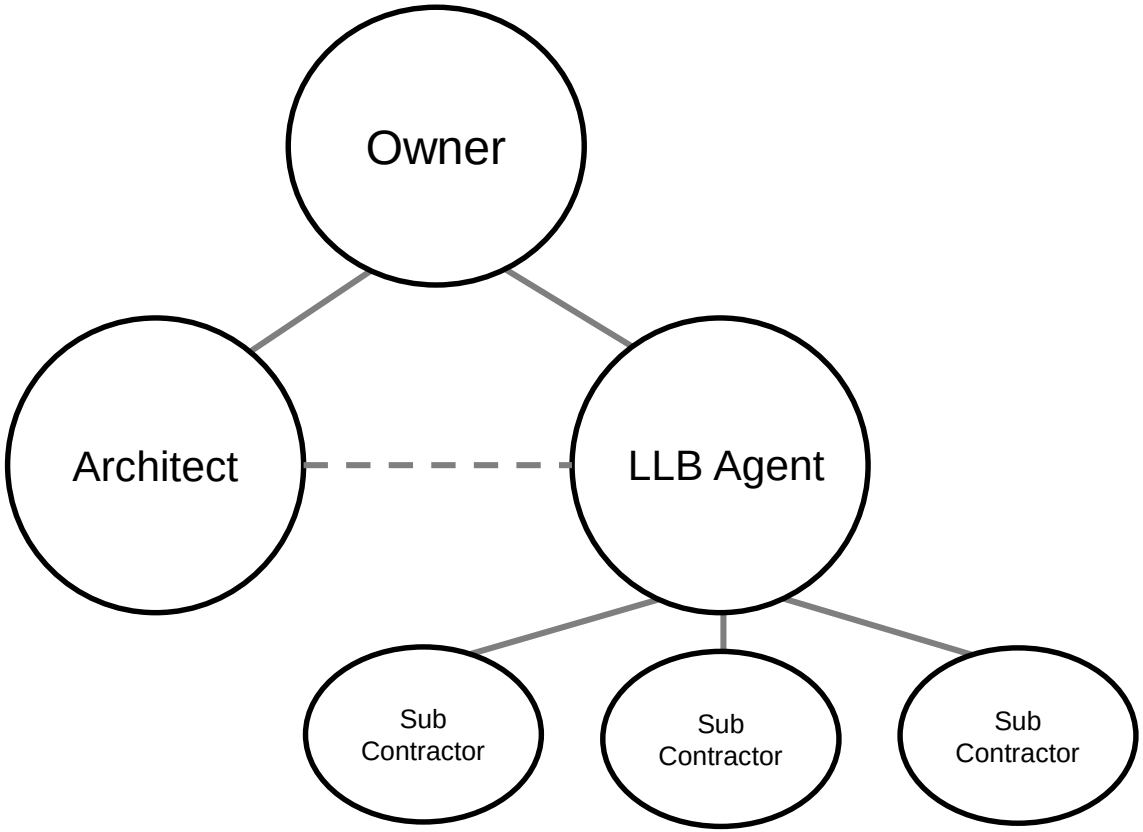
Lease-Leaseback

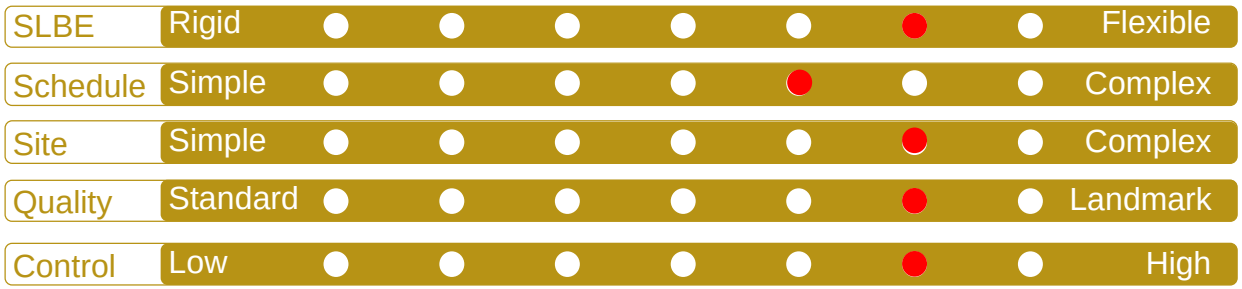
Lease-leaseback projects allow Districts, without advertising for bids, to lease property currently owned by the District to any lease leaseback agent for a predetermined lease period, which must exceed the construction duration. Selection is based on a best value selection, combining price and qualifications. After the lease period, the buildings vest to the District. This statutory language requires that the District lease its property to a chosen design/build contractor.



Lease-Leaseback

CONTRACT STRUCTURE





PROS

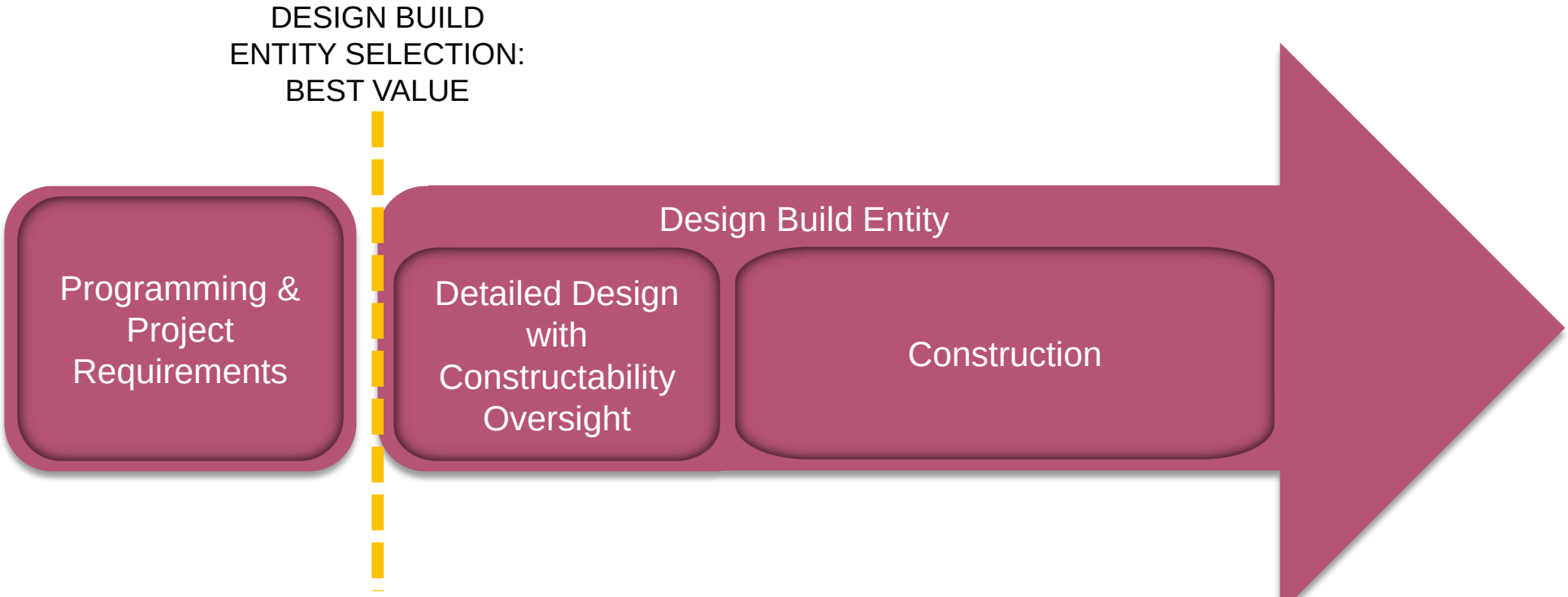
- LLB Agent is chosen based on best value
- LLB Agent provides design assist
- LLB Agent maintains facility during the lease period
- SLBE: Allows for targeted sub-contractor selection to maximize LBU.

CONS

- Overall cost can be higher
- Guaranteed Maximum Price (GMP) is negotiated after DSA approval

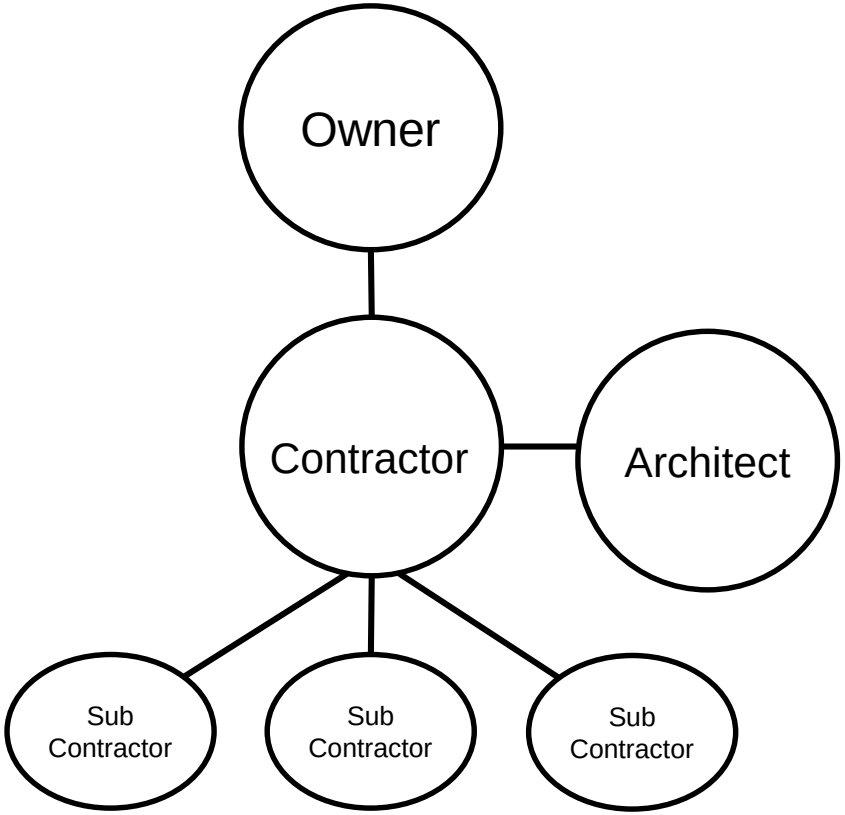
Design-Build

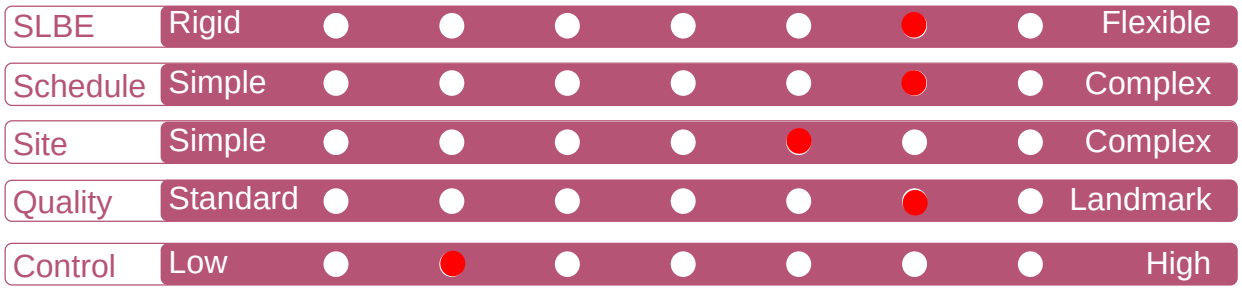
In a Design-Build project, the contractor and architect form a single entity (DBE) to deliver a complete project based on a conceptual plan provided by the District. This method allows for greater control over the schedule, quality of work, and the efficiency of the project as conflicts between design and construction are significantly reduced. The District holds one contract with the DBE, and the DBE holds all subcontractor contracts.



Design-Build (Traditional)

CONTRACT STRUCTURE





PROS

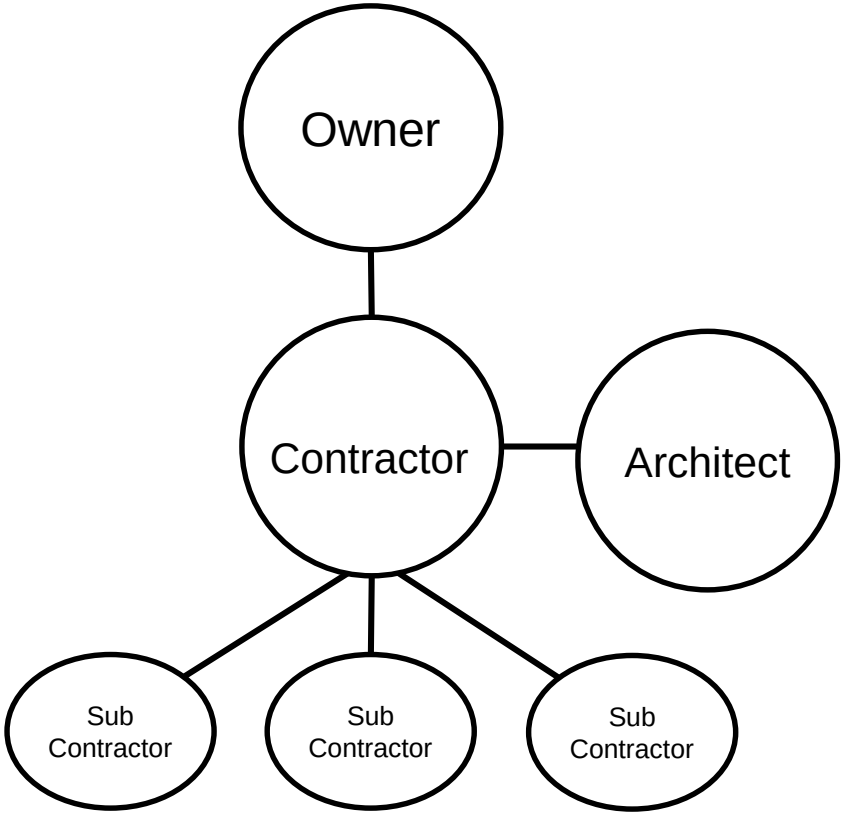
- Design-build entities can be chosen by design competition or chosen by qualifications
- Guaranteed Maximum Price (GMP) determined prior to construction
- Risk can be transferred to the design-build entity earlier in design
- SLBE: Allows for targeted sub-contractor selection to maximize LBU.

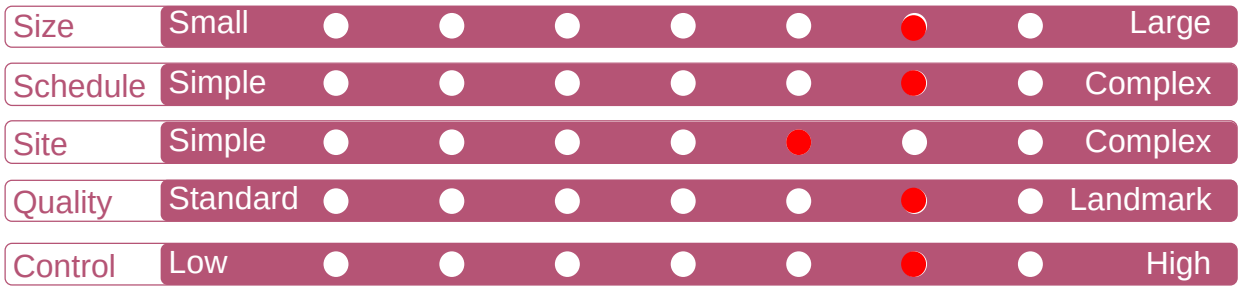
CONS

- GC is likely to be large , non local builder
- Need to have clear, complete Ed Specs/ Project Criteria
- Architect is hired by the contractor, not the district
- Some contracts allow the owner less design control

Design-Build (Progressive)

CONTRACT STRUCTURE





PROS

- Design-build entities can be chosen by design competition or chosen by qualifications
- Guaranteed Maximum Price (GMP) determined prior to construction
- Risk can be transferred to the design-build entity earlier in design
- Current legislation requires 60% skilled labor
- Collaborative relationship between contractor and architect

CONS

- Complex contractual relationship
- Architect is hired by the contractor, not the district
- Some contracts allow the owner less design control

Design Build Consideration

- **PASS BOARD RESOLUTION ACCEPTING DESIGN BUILD; INCLUDING RATIONALE FOR USING**
- **DEVELOP POLICIES AND PROCEDURES FOR DESIGN BUILD**
- **MUST CREATE CRITERIA DOCUMENTS: PROGRAM, PHASING, SITE CONSIDERATIONS**
- **MUST HAVE COMPLETE EDUCATIONAL SPECIFICATIONS: INCLUDING DISTRICT STANDARDS AND GUIDELINES, ROOM SPECS, ETC.**
- **SCHEDULE BENEFITS MAY NOT BE ACHIEVED DUE TO FRONT LOADED WORK REQUIRED**
- **MUST EDIT CONTRACT DOCUMENTS**

OUSD Project Delivery Historic Record

PROJECT LIST BY DELIVERY METHOD

Design-Bid-Build

- Play-surface Replacements
- McClymond Intensive Support Project
- Fire/Intrusion Alarm- Misc. Sites

Lease-Leaseback

- Fremont High School
- The Central Kitchen
- Glenview

Design-Build

- CSI Sun Power Solar Projects- Misc. Campuses

Project Recommendations

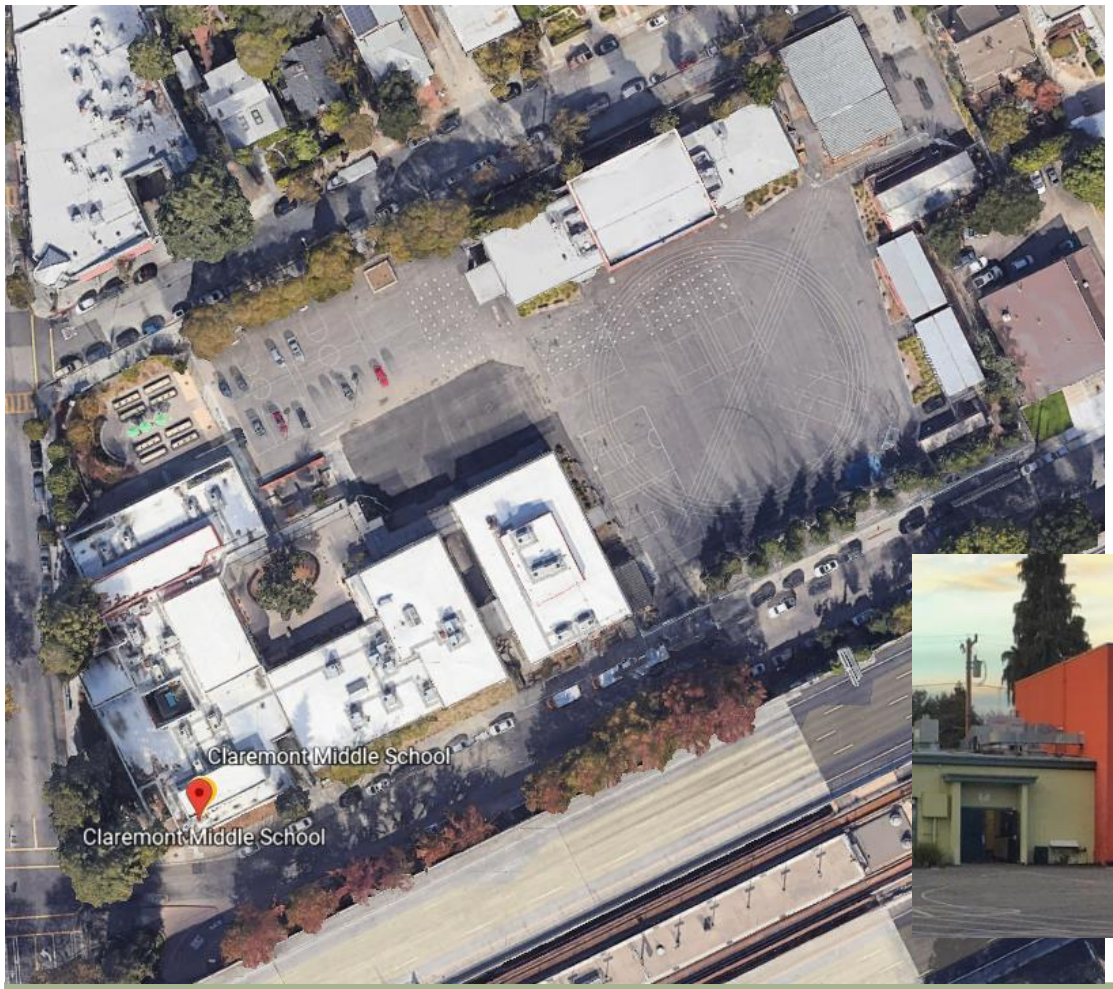
OUSD Project Delivery Recommendations

SCORING METHODOLOGY

- All projects scored from 1-10; 10 being most important/ complex- rate high
- SLBE: All projects rated 10 due to board policy
- Schedule: If project has multiple phases; short schedule, has to meet tight academic constraints- rates high
- Quality:
  - Expected Use: 0-20 years- rate low
  - Expected use: 20+ years- rate high
- Control (Design): Based on complexity of design; amount of design committee feedback anticipated; effort to define the basis of design- rate high

OUSD Project Delivery Recommendations

CLAREMONT MIDDLE SCHOOL MULTIPURPOSE



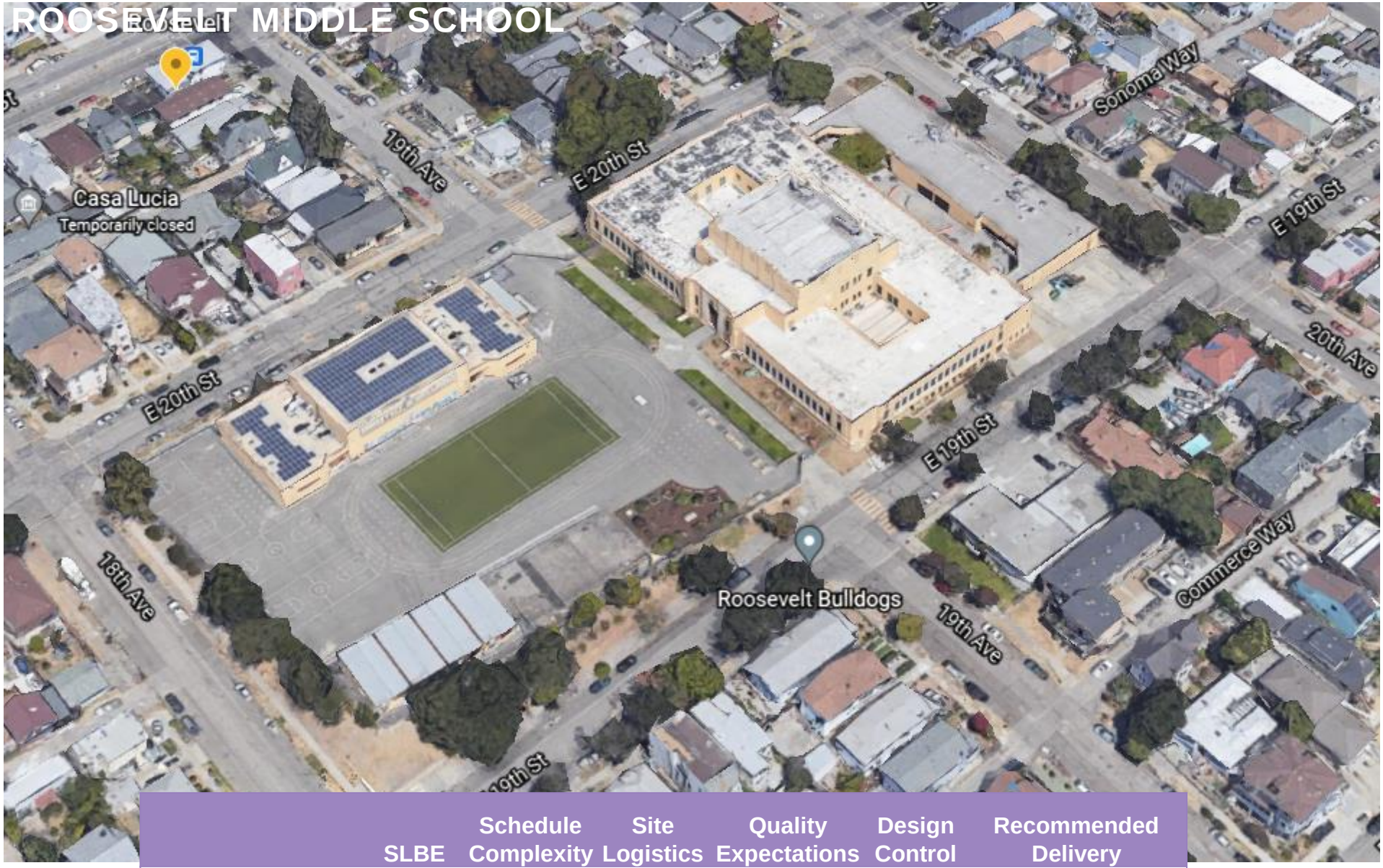
	SLBE	Schedule Complexity	Site Logistics	Quality Expectations	Control	Recommended Delivery
Claremont MS- MP	10	2	10	7	7	**DBB**

OUSD Project Delivery Recommendations

LAUREL SITE- CDC

	SLBE	Schedule Complexity	Site Logistics	Quality Expectations	Control	Recommended Delivery
Laurel CDC	10	2	4	4	3	**DBB**

OUSD Project Delivery Recommendations



	SLBE	Schedule Complexity	Site Logistics	Quality Expectations	Design Control	Recommended Delivery
Roosevelt	10	8	8	6	7	**LLB**

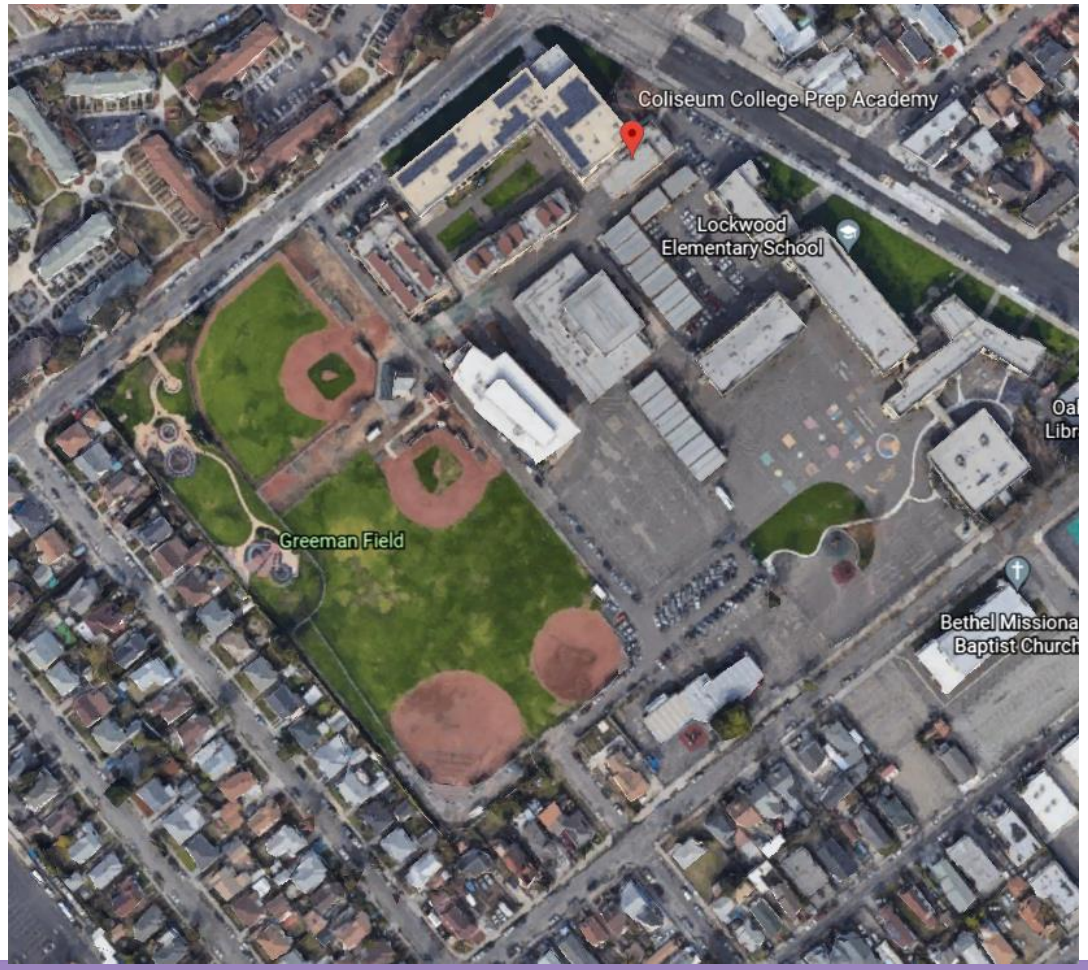
OUSD Project Delivery Recommendations

MCCLYMONDS HS

	SLBE	Schedule Complexity	Site Logistics	Quality Expectations	Design Control	Recommended Delivery
MCCLYMONDS	10	8	7	8	6	**DB**

OUSD Project Delivery Recommendations

COLISEUM COLLEGE PREP ACADEMY



	SLBE	Schedule Complexity	Site Logistics	Quality Expectations	Design Control	Recommended Delivery
CCPA	10	8	8	8	5	**DB**

Project Delivery Recommendations

CURRENT MEASURE Y BOND PROJECTS OVERVIEW

	SLBE	Schedule Complexity	Site Logistics	Quality Expectations	Design Control	Recommended Delivery
Claremont MS	10	2	10	7	7	**DBB**
Laurel CDC	10	2	4	4	3	**DBB**
Roosevelt	10	8	8	6	7	**LLB**
McClymond	10	8	4	8	6	**DB**
CCPA	10	8	8	8	5	**DB**

**All criteria rated on a scale from 0-10 with 0 being smallest magnitude, 10 being largest magnitude.*