



OUSD FACILITIES DEPARTMENT  
**PROCEDURES MANUAL 2022**

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**PROGRAM OVERVIEW DOCUMENTS**

## 1.1 | Program Introduction

The Oakland Unified School District (OUSD) management team is committed to capturing, documenting, and improving the processes and procedures of the Facilities Department. This procedures manual is the tool that will define, diagram, and describe the necessary procedures to complete projects at OUSD. Hundreds of projects have been completed over the last several years, but improvements in the project delivery system will allow projects to be completed with less attention to the management of the system and more attention to the management of each project; therefore, capturing and improving the processes and procedures will remove many barriers to optimizing OUSD Bond Team performance.

This Procedures Manual is a repository for the OUSD management team's best practices (working in conjunction with various OUSD departments and staff members). The District's Board and Administration endorse and support these procedures, which are carefully crafted with efficiency, clarity, and decisiveness in mind. Once a procedure is issued, it establishes the direction the team is expected to follow.

The procedures are thoroughly researched, developed, and tested while also intended to be adaptable to the changing circumstances affecting the Facilities Department. After the procedures are published, the OUSD management team will continue to improve these procedures as needed. Comments from the team and others are encouraged, and each comment and suggestion will be evaluated for merit and appropriateness.

The Procedure Manual is divided into seven sections, including procedures, process flow diagrams, and sample forms. The steps required for processing an individual document are outlined in this manual. Project team members should refer to this document for effective and efficient means of accomplishing a task within the governing rules and laws. Once a procedure is developed and added to this manual, it must be followed. The OUSD management team looks forward to developing, utilizing, and evolving this Procedures Manual and the streamlined yet comprehensive project management that it will yield.

## 1.2 | School Year Calendar



# 2021-22 School Calendar

July							August							September						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		

October							November							December						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6				1	2	3	4
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24/31	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	

January							February							March						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1			1	2	3	4	5			1	2	3	4	5
2	3	4	5	6	7	8	6	7	8	9	10	11	12	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26	20	21	22	23	24	25	26
23/30	24/31	25	26	27	28	29	27	28						27	28	29	30	31		

April							May							June						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2	1	2	3	4	5	6	7				1	2	3	4
3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7	8	9	10	11
10	11	12	13	14	15	16	15	16	17	18	19	20	21	12	13	14	15	16	17	18
17	18	19	20	21	22	23	22	23	24	25	26	27	28	19	20	21	22	23	24	25
24	25	26	27	28	29	30	29	30	31					26	27	28	29	30		

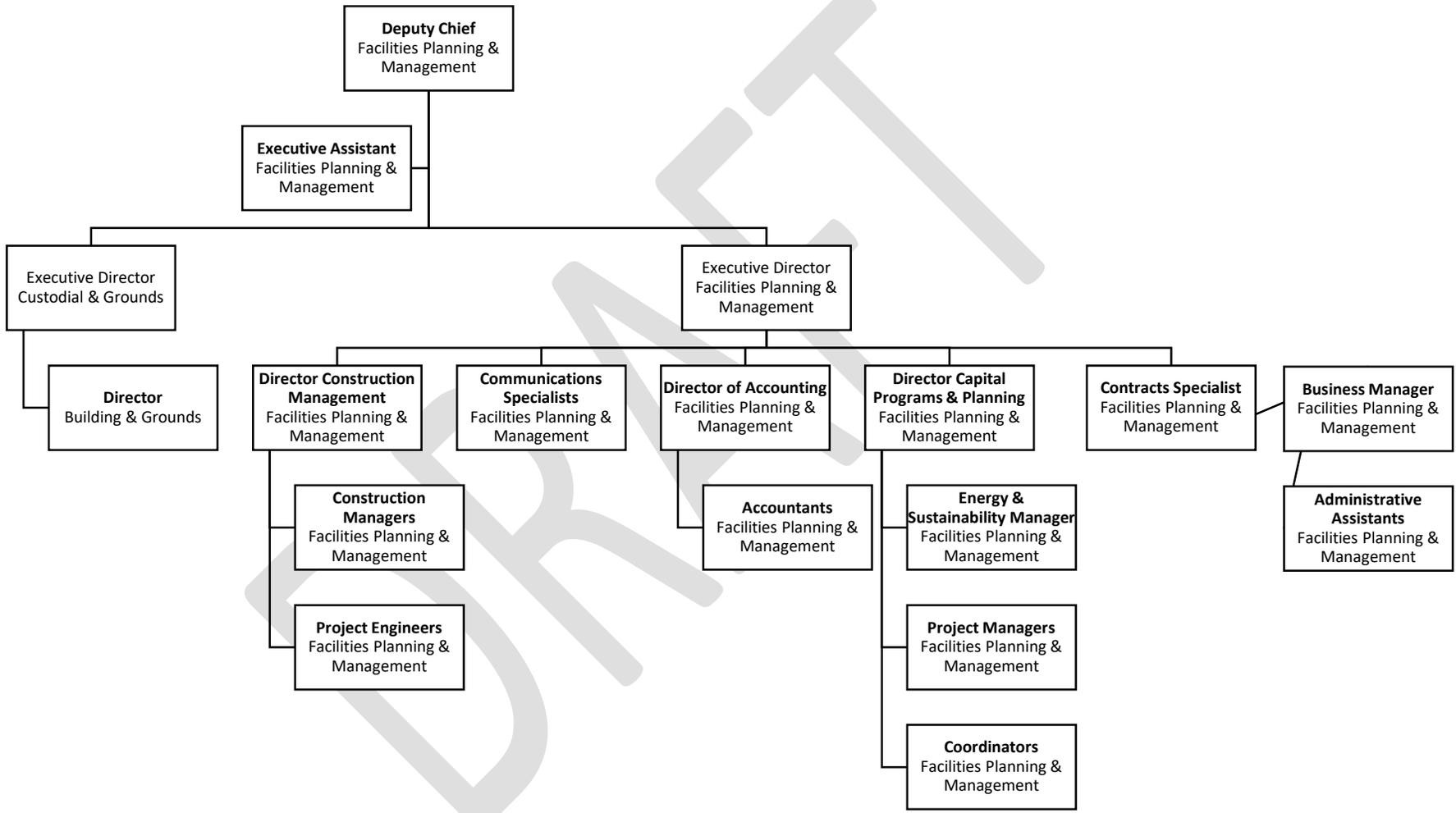
- Jul 5 Independence Day Holiday
- Aug 4 Professional Development Day
- Aug 5 Collaboration Day / Work Day
- Aug 6 Teacher Work Day
- Aug 9 First Day of School
- Sep 3 Professional Development Day
- Sep 6 Labor Day
- Sep 17 Marking Period 1 (S)
- Oct 11 Indigenous Peoples' Day (in lieu of Lincoln's birthday)
- Oct 11 Marking Period 2 (S)
- Oct 29 Marking Period 2 (S)
- Nov 5 End of Trimester 1 (E)
- Nov 11 Veterans' Day
- Nov 22-26 Thanksgiving Break
- Dec 17 Marking Period 3 (S) / Marking Period 4 (Fall Semester) End of Semester 1 (S)
- Dec 20-31 Winter Break

- Jan 3 Start of the Spring Semester (S)
- Jan 14 Professional Development Day
- Jan 17 Martin Luther King, Jr. Day
- Feb 11 Marking Period 5 (S)
- Feb 21 Presidents' Day
- Feb 25 End of Trimester 2 (E)
- Mar 25 Marking Period 6 (S)
- Apr 1 Cesar Chavez Day
- Apr 4-8 Spring Break
- May 25 Last Day of Instruction / Marking Period 7 (S) / Marking Period 8 (Spring Semester) / End of Trimester 3 (E)
- May 26 Teacher Work Day
- May 30 Memorial Day

- **First/Last Day of School**
- **Schools, District Offices & Child Development Centers Closed**
- **Schools Closed** (District Offices & Child Development Centers Open)
- **Schools & Child Development Centers Closed** (District Offices Open)
- **No School for Students**
- **Marking Periods/ Report Card Periods**  
*Individual student progress reports are sent to families within two school weeks of these dates. For information about Secondary Marking Period Dates, please visit [www.ousd.org/districtcalendar](http://www.ousd.org/districtcalendar)*
- **Summer Learning**

@OUSDnews | [www.ousd.org](http://www.ousd.org)  
 1000 Broadway, Ste. 300, Oakland, CA 94607

### 1.3 | Facilities Planning and Management Organizational Chart



## 1.4 | Facilities Department Directory

### Facilities

FACILITIES PLANNING & MANAGEMENT  
 955 High Street, Oakland, CA 94601  
 510-535-2728 - Phone  
 510-535-7040 - Fax

NAME	FIRM	WORK #	CELL #	E-MAIL
Alawdi, Abdulletief	Acumen		365-9005	<a href="mailto:abdulletief.alawdi@ousd.org">abdulletief.alawdi@ousd.org</a>
Anderson, Al	LP	535-7045 (16)	798-0116	<a href="mailto:al.anderson@ousd.org">al.anderson@ousd.org</a>
Bermudez, Ray	OUSD	535-7043 (60)	415-710-5478	<a href="mailto:ray.bermudez@ousd.org">ray.bermudez@ousd.org</a>
Berry, Michelle	OUSD	535-7080 (29)		<a href="mailto:michelle.berry@ousd.org">michelle.berry@ousd.org</a>
Brower, Kyle	B&D		459-1809	<a href="mailto:kyle.brower@ousd.org">kyle.brower@ousd.org</a>
Chatman, Kenya	OUSD	535-7050 (63)	467-3391	<a href="mailto:kenya.chatman@ousd.org">kenya.chatman@ousd.org</a>
Colbert, David	OUSD	535-7060 (42)	759-7559	<a href="mailto:david.colbert2@ousd.org">david.colbert2@ousd.org</a>
Comrie, Elena	Cumming		415-916-2461	<a href="mailto:ecomrie@ccorpusa.com">ecomrie@ccorpusa.com</a>
Cornish, JaQuan	OUSD	535-7041 (57)	412-721-2899	<a href="mailto:jaquan.cornish@ousd.org">jaquan.cornish@ousd.org</a>
Esposito, John	OUSD	535-7049 (52)	277-6530	<a href="mailto:john.esposito@ousd.org">john.esposito@ousd.org</a>
Ezeh, Michael	OUSD	535-7081 (62)		<a href="mailto:michael.ezeh@ousd.org">michael.ezeh@ousd.org</a>
Fierston, Michelle (Shelly)	MF		459-5256	<a href="mailto:michelle.fierston@ousd.org">michelle.fierston@ousd.org</a>
Hall, Deshonnie	SD		517-1155	<a href="mailto:deshonnie.hall@ousd.org">deshonnie.hall@ousd.org</a>
Havenar-Daughton, Brendan	OUSD	535-7053 (41)	414-0957	<a href="mailto:brendan.havenar@ousd.org">brendan.havenar@ousd.org</a>
Henderson, Chastity	Baines		415-724-7895	<a href="mailto:chastity.henderson@ousd.org">chastity.henderson@ousd.org</a>
Henderson, Pamila M.	OUSD	535-7062 (12)	925-335-6403	<a href="mailto:pamilam.henderson@ousd.org">pamilam.henderson@ousd.org</a>
Herra, Arlene Velasco	OUSD	535-7064 (15)		<a href="mailto:arlene.herra@ousd.org">arlene.herra@ousd.org</a>
Hoang, Huy	B&D		666-5153	<a href="mailto:huy.hoang@ousd.org">huy.hoang@ousd.org</a>
Howell, John	Cordoba	535-7066 (66)	299-0618	<a href="mailto:john.howell@ousd.org">john.howell@ousd.org</a>
Hu, Fanny	Baines	436-2791	269-3060	<a href="mailto:fanny.hu@ousd.org">fanny.hu@ousd.org</a>
Hunter, Juanita	OUSD	535-7044 (24)	712-9969	<a href="mailto:juanita.hunter@ousd.org">juanita.hunter@ousd.org</a>
Jang, Colland	B&D	535-7054 (51)	326-7070	<a href="mailto:colland.jang@ousd.org">colland.jang@ousd.org</a>
Jordan, Shante	Cordoba	532-2802	415-308-0231	<a href="mailto:shante.jordan@ousd.org">shante.jordan@ousd.org</a>
Keita, Jean-Luc	OUSD	535-7072 (44)	560-3975	<a href="mailto:jean-luc.keita@ousd.org">jean-luc.keita@ousd.org</a>
Knutson, Natassia	PSS		909-538-3053	<a href="mailto:natassia@psscrt.com">natassia@psscrt.com</a>
Ledezma, Mary	OUSD	535-7055 (26)	499-4447	<a href="mailto:mary.ledezma@ousd.org">mary.ledezma@ousd.org</a>
Lewis, La Juana	OUSD	535-2731 (21)	692-5009	<a href="mailto:lajuana.lewis@ousd.org">lajuana.lewis@ousd.org</a>
Manansala, Victor	Kitchell		415-680-4384	<a href="mailto:victor.manansala@ousd.org">victor.manansala@ousd.org</a>
McDonald, Sherri	OUSD	535-7046 (23)	925-457-7802	<a href="mailto:sherri.mcdonald@ousd.org">sherri.mcdonald@ousd.org</a>
Meza, Imelda	Hattin	261-8330	813-2130	<a href="mailto:imelda.meza@ousd.org">imelda.meza@ousd.org</a>
Nakadegawa, Tadashi	OUSD	535-7038 (30)		<a href="mailto:tadashi.nakadegawa@ousd.org">tadashi.nakadegawa@ousd.org</a>
Newton, Mark	B&D		408-306-8909	<a href="mailto:mark.newton@ousd.org">mark.newton@ousd.org</a>
Nieves-Thurau, Linda	OUSD	535-7095 (43)		<a href="mailto:linda.nieves@ousd.org">linda.nieves@ousd.org</a>
Orr, Paul	Cordoba	535-7077 (38)	415-940-2175	<a href="mailto:paul.orr@ousd.org">paul.orr@ousd.org</a>
Press, Hannah	B&D		409-2784	<a href="mailto:hannah.press@ousd.org">hannah.press@ousd.org</a>
Ravarra, Valiant	Cordoba	437-6320	916-837-9088	<a href="mailto:valiant.ravarra@ousd.org">valiant.ravarra@ousd.org</a>
Reid, Donneva	OUSD	535-7078 (48)		<a href="mailto:donneva.reid@ousd.org">donneva.reid@ousd.org</a>
Rogers, Richard	OUSD	535-7048 (64)	228-9727	<a href="mailto:richard.rogers@ousd.org">richard.rogers@ousd.org</a>
Sims, Lee	Sims	535-7094 (65)	415-572-2601	<a href="mailto:lee.sims@ousd.org">lee.sims@ousd.org</a>
Soo, Sandra	OUSD	437-6318 (7161)		<a href="mailto:sandra.soo@ousd.org">sandra.soo@ousd.org</a>
Stone, Christina	Cordoba	535-7051 (34)	512-0066	<a href="mailto:christina.stone@ousd.org">christina.stone@ousd.org</a>
Tarpeh III, Penti	OUSD	535-7039 (39)		<a href="mailto:peni.tarpehIII@ousd.org">peni.tarpehIII@ousd.org</a>
Torres, Mike	SD		637-9290	<a href="mailto:mike.torres@ousd.org">mike.torres@ousd.org</a>
Vinuya, Emiliano	B&D	535-7047 (53)	331-4982	<a href="mailto:emiliano.vinuya@ousd.org">emiliano.vinuya@ousd.org</a>
Wells, Nicole	OUSD	535-2726 (46)	205-5453	<a href="mailto:nicole.wells@ousd.org">nicole.wells@ousd.org</a>

**Fax Numbers:**

PM Area Fax: 535-7042  
 Accounting Department: 535-7082  
 Trailer: 535-7069

**Additional Phone Numbers:**

Custodial Services: 434-2202  
 Work Control: 535-2718  
 Warehouse: 434-2232  
 Voicemail Access: 848-8089

**Buildings and Grounds Directory**

OAKLAND UNIFIED SCHOOL DISTRICT

Buildings & Grounds Dept.

Fax 510-535-2732

Voice Mail # 510-848-8089

	SHOP	535-	EXT	FAX #	CELL
<b><u>MANAGEMENT</u></b>					
MARC WHITE		2717	54	436-6264	510-277-6559
MARK CAVALLI		2721	22	436-7815	510-277-6705
ANGELICA OCHOA		2725	31		510--684-3145
STANLEY LU		7057	49	434-1433	510-277-6761
OLGA BERMEO	Grounds	7037		434-7448	510-277-6733
	Labor	7036			
ROBERT STRONG JR	Roofing	434-3341		434-3342	<b>510-725-8961</b>
	Paint Shop	434-2223			
NICKOLAS KUVETAKIS	Electrical	2733		535-2735	510-277-6736
	Alarm	532-8764			
	Tele-Com	434-1209	69		
MARK GRIGGS (Acting)	Plumbing	7034		535-7035	<b>510-277-6663</b>
	Steamfitter	2748		535-2749	
	Sheet Metal	2747			
STEVEN TERRELL	Carpentry	2741		535-2743	510-277-6690
	Glazier				
	Locksmith	2745		535-2746	
MARCUS BOARD	PM	2730	33	436-2730	510-277-6719
SORBOR TWEGBE	Health & Safety	2723			415-632-0350
<b><u>OFFICE STAFF</u></b>					
JULIE LIM		7058	28		510-277-6545
JAPERA RATLIFF	Customer Service & Supp	2718	47		510-277-6752
Auto Receptionist					510-926-2563
<b><u>LEAD</u></b>					
PETER KAROUTAS	Electrician	2733			510-277-6891
BERNARDO MARTINEZ	Gardener	7037			510-277-6547
DAVID ENG	Locksmith	2745			510-277-6757
BANIPAL SAATLOO	Steamfitter	2748			510-277-6601
BEN CAUTIVERIO	<b>ACTING -Telecom</b>	434-1209	69		510-277-6768

**Custodial Services**

Custodial Services Contact List				
Main Office Number: 510-434-2202			Fax Number: 510-437-6303	
After-hours Number: 510-990-2302				
Name	Title	Office Number	Cell Phone #	Email Address
Seema Saluja	Admin. Asst. III	510-434-2202 x193	510-386-9974	<a href="mailto:seema.saluja@ousd.org">seema.saluja@ousd.org</a>
Christine Broach	Field Supervisor	510-434-2208 x155	510-302-7487	<a href="mailto:christine.broach@ousd.org">christine.broach@ousd.org</a>
Roland Broach	Executive Director	510-434-2202 x115	510-927-5985	<a href="mailto:roland.broach@ousd.org">roland.broach@ousd.org</a>
Deon Guillary	Custodial Manager	510-437-6316 x125	510-776-7148	<a href="mailto:deon.guilloryii@ousd.org">deon.guilloryii@ousd.org</a>
Angela Lloyd	Field Supervisor	510-434-2207 x117	510-541-0786	<a href="mailto:angela.lloyd@ousd.org">angela.lloyd@ousd.org</a>
Kechette Walls	Office Manager	510-434-2210 x115	415-407-3827	<a href="mailto:kechette.walls@ousd.org">kechette.walls@ousd.org</a>
Bennie Wilson	Field Supervisor	510-434-2205 x114	209-587-1034	<a href="mailto:bennie.wilson@ousd.org">bennie.wilson@ousd.org</a>
Civic Center Contact List				
Main Office Number: 510-434-3352			Fax Number 510-437-2209	
Name	Title	Office Number	Cell Phone #	Email Address
Cynthia Harding	Facilities Use Data Analyst	510-434-3352 x178	510-407-0140	<a href="mailto:cynthia.harding@ousd.org">cynthia.harding@ousd.org</a>

Revised: 2/10/21



## Schools Directories



**OAKLAND UNIFIED  
SCHOOL DISTRICT**  
Community Schools, Thriving Students

## 2021-22 SCHOOLS DIRECTORY

Updated August 25, 2021. All phone and fax numbers use the (510) area code. Find the most recent version at [www.ousd.org/schools](http://www.ousd.org/schools).

### ELEMENTARY SCHOOLS

#### ACORN WOODLAND (K-5) • site 165

Principal Julissa Lambert-Yank / 1025 81st Avenue, 94621 / Phone: 879-5570 Fax: 627-9165

#### ALLENDALE (TK-5) • site 101

Principal Ronald Towns / 3670 Penniman Avenue, 94619 / Phone: 879-2101 Fax: 627-9101

#### BELLA VISTA (TK-5) • site 102

Principal Linda Flynn / 1025 East 28th Street, 94610 / Phone: 879-2102 Fax: 627-9102

#### BRIDGES ACADEMY (TK-5) • site 178

Principal Anita Iverson-Comelo / 1325 53rd Avenue, 94601 / Phone: 879-2178 Fax: 627-9178

#### BROOKFIELD (TK-5) • site 103

Principal Leigh Daniels / 401 Jones Avenue, 94603 / Phone: 879-2103 Fax: 627-9103

#### BURCKHALTER (K-5) • site 105

Principal Carin Geathers / 3994 Burckhalter Avenue, 94605 / Phone: 879-2105 Fax: 729-7703

#### CARL MUNCK (TK-5) • site 168

Principal Denise Burroughs / 11900 Campus Drive, 94619 / Phone: 879-3168 Fax: 627-9168

#### CHABOT (K-5) • site 106

Principal Jessica Cannon / 6686 Chabot Road, 94618 / Phone: 879-2106 Fax: 627-9106

#### CLEVELAND (K-5) • site 108

Principal Peter Van Tassel / 745 Cleveland Street, 94606 / Phone: 879-2108 Fax: 627-9108

#### CROCKER HIGHLANDS (K-5) • site 111

Principal Kim Dung Nguyen / 525 Midcrest Road, 94610 / Phone: 879-3111 Fax: 627-9111

#### EAST OAKLAND PRIDE (K-5) • site 107

Principal Michelle Grant / 8000 Birch Street, 94621 / Phone: 879-2107 Fax: 627-9107

#### EMERSON (TK-5) • site 115

Principal Heather Palin / 4803 Lawton Avenue, 94609 / Phone: 879-2115 Fax: 627-9115

#### ENCOMPASS ACADEMY (TK-5) • site 181

Principal Minh-Trâm Nguyen / 1025 81st Avenue, 94621 / Phone: 879-2181 Fax: 627-9181

#### ESPERANZA (TK-5) • site 177

Principal Cristina Segura / 10315 E Street, 94603 / Phone: 879-2177 Fax: 627-9177

#### FRANKLIN (TK-5) • site 116

Principal Lusa Lai / 915 Foothill Boulevard, 94606 / Phone: 879-2116 Fax: 627-9116

#### FRED T. KOREMATSU DISCOVERY ACADEMY (K-5) • site 172

Principal Amie Lamontagne / 10315 E Street, 94603 / Phone: 879-2172 Fax: 627-9172

#### FRUITVALE (TK-5) • site 117

Principal Eugene Stovall IV / 3200 Boston Avenue, 94602 / Phone: 879-5117 Fax: 627-9117

#### GARFIELD (TK-5) • site 118

Principal Edgar Rodriguez-Ramirez / 1640 22nd Avenue, 94606 / Phone: 879-2118 Fax: 627-9118

#### GLENVIEW (TK-5) • site 119

Principal Rachel Quinn / 4215 La Cresta Avenue, 94602 / Phone: 879-5580 Fax: 627-9119

#### GLOBAL FAMILY (TK-5) • site 114

Principal Juan Vaca / 2035 40th Avenue, 94601 / Phone: 879-2114 Fax: 627-9114

#### GRASS VALLEY (K-5) • site 122

Principal Casey Beckner / 4720 Dunkirk Avenue, 94605 / Phone: 879-2122 Fax: 627-9122

#### GREENLEAF (TK-8) • site 112

Principal Annika Rudback / 6328 East 17th Street, 94621 / Phone: 879-3112 Fax: 627-9112

#### HILLCREST (K-8) • site 127

Principal Maria McCormick / 30 Marguerite Drive, 94618 / Phone: 879-5127 Fax: 627-9127

#### HOOVER (K-5) • site 170

Principal Lisette Averhoff / 890 Brockhurst Street, 94608 / Phone: 879-2170 Fax: 627-9170

#### HORACE MANN (TK-5) • site 136

Principal Tammie Adams / 5222 Ygnacio Avenue, 94601 / Phone: 879-2136 Fax: 627-9136

#### INTERNATIONAL COMMUNITY SCHOOL (K-5) • site 186

Principal Eleanor Alderman / 2825 International Blvd, 94601 / Phone: 879-2186 Fax: 627-9186

#### JOAQUIN MILLER (K-5) • site 142

Principal Sara Green / 5525 Ascot Drive, 94611 / Phone: 879-8142 Fax: 627-9142

#### LA ESCUELITA (TK-8) • site 121

Principal Faris Jabbar / 1050 Second Ave, 94606 / Phone: 879-2121 Fax: 627-9121

#### LAUREL (TK-5) • site 131

Principal John Stangl / 3750 Brown Avenue, 94619 / Phone: 879-2131 Fax: 627-9131

#### LINCOLN (TK-5) • site 133

Principal Mukta Sambrani / 225 11th Street, 94607 / Phone: 879-5133 Fax: 627-9133

#### LOCKWOOD STEAM ACADEMY (TK-5) • site 160

Principal Nehseem Ratchford / 6701 International Boulevard, 94621 / Phone: 879-2123 Fax: 627-9123

#### MADISON PARK ACADEMY PRIMARY (TK-5) • site 154

Principal Elaina Amos / 470 El Paseo Drive, 94603 / Phone: 879-8164 Fax: 627-9154

#### MANZANITA COMMUNITY SCHOOL (TK-5) • site 179

Principal Amy Jones / 2409 East 27th Street, 94601 / Phone: 879-2179 Fax: 627-9179

#### MANZANITA SEED (TK-5) • site 175

Principal Catherine Rachelle McManus / 2409 East 27th Street, 94601 / Phone: 879-0175 Fax: 627-9175

#### MARKHAM (TK-5) • site 138

Principal Byron Delcomb / 7220 Krause Avenue, 94605 / Phone: 879-2138 Fax: 627-9138

#### MARTIN LUTHER KING, JR. (PK-5) • site 182

Principal Roma Groves-Waters / 960 10<sup>th</sup> Street, 94607 / Phone: 879-2182 Fax: 627-9182

#### MELROSE LEADERSHIP ACADEMY (TK-8) • site 235

Principal Brianne Zika / 4730 Fleming Avenue, 94619 / Phone: 879-2152 Fax: 627-9235

#### MONTCLAIR (TK-5) • site 143

Principal Maithe Barloga / 1757 Mountain Boulevard, 94611 / Phone: 879-3143 Fax: 627-9143

#### NEW HIGHLAND ACADEMY (K-5) • site 125

Principal Samantha Keller / 8521 A Street, 94621 / Phone: 879-2125 Fax: 627-9125

#### OAKLAND ACADEMY OF KNOWLEDGE (OAK) (K-5) • site 169

Principal Nikki Williams / 8755 Fontaine Street, 94605 / Phone: 879-5166 Fax: 627-9166

#### PARKER (K-8) • site 144

Principal Rocquel Colbert / 7929 Ney Avenue, 94605 / Phone: 879-5144 Fax: 627-9144

#### PERALTA (K-5) • site 145

Principal Shirley Clem / 460 63rd Street, 94609 / Phone: 879-3145 Fax: 627-9145

#### PIEDMONT AVENUE (TK-5) • site 146

Principal Zarina Ahmad / 4314 Piedmont Avenue, 94611 / Phone: 879-3146 Fax: 627-9146

#### PRESCOTT (TK-5) • site 183

Principal Enomwoyi Booker / 920 Campbell Street, 94607 / Phone: 879-2183 Fax: 627-9183

#### REACH ACADEMY (TK-5) • site 193

Principal Natasha Flint-Moore / 9845 Bancroft Avenue, 94603 / Phone: 879-2193 Fax: 627-9193

#### REDWOOD HEIGHTS (K-5) • site 148

Principal Cynthia Bagby / 4401 39th Avenue, 94619 / Phone: 879-2148 Fax: 627-9148

#### RISE (TK-5) • site 192

Principal Samantha Keller / 8521 A Street, 94621 / Phone: 879-2192 Fax: 627-9192

#### SANKOFA UNITED (K-5) • site 194

Principal Dennis Guikema / 581 61st Street, 94609 / Phone: 879-2194 Fax: 627-9194

#### SEQUOIA (TK-5) • site 151

Principal Zetha Nobles / 3730 Lincoln Avenue, 94602 / Phone: 879-2151 Fax: 627-9151

#### THINK COLLEGE NOW (K-5) • site 190

Principal Ana Vasquez-Coleman / 2825 International Boulevard, 94601 / Phone: 879-2190 Fax: 627-9190

#### THORNHILL (TK-5) • site 157

Principal Steven Daubenspeck / 5880 Thornhill Drive, 94611 / Phone: 879-2157 Fax: 627-9157



## 2021-22 SCHOOLS DIRECTORY

Updated August 25, 2021. All phone and fax numbers use the (510) area code. Find the most recent version at [www.ousd.org/schools](http://www.ousd.org/schools).

### MIDDLE SCHOOLS

#### **BRET HARTE (6-8) • site 206**

Principal April Harris / 3700 Coolidge Avenue, 94602 /  
Phone: 879-2206 Fax: 627-9206

#### **CLAREMONT (6-8) • site 201**

Principal Tremaine Moore / 5750 College Avenue, 94618 /  
Phone: 879-2201 Fax: 627-9201

#### **EDNA BREWER (6-8) • site 210**

Principal Aubrey Layne / 3748 13th Avenue, 94610 /  
Phone: 879-3210 Fax: 627-9210

#### **ELMHURST UNITED (6-8) • site 229**

Principal Kilian Betlach / 1800 98th Avenue, 94603 /  
Phone: 879-3229 Fax: 627-9229

#### **FRICK UNITED ACADEMY OF LANGUAGE (6-8) • site 219**

Principal Amapola Obrera / 2845 64th Avenue, 94605 /  
Phone: 879-3219 Fax: 627-9219

#### **MONTERA (6-8) • site 211**

Principal Darren Avent / 5555 Ascot Drive, 94611 /  
Phone: 879-3211 Fax: 627-9211

#### **ROOSEVELT (6-8) • site 212**

Principal Joao Solomon / 1926 19th Avenue, 94606 /  
Phone: 879-3212 Fax: 627-9212

#### **UNITED FOR SUCCESS (6-8) • site 228**

Principal Sara Allen / 2101 35th Avenue, 94601 / Phone:  
879-3228 Fax: 627-9228

#### **URBAN PROMISE ACADEMY (6-8) • site 236**

Principal Pierre Mesa / 3031 East 18th Street, 94601 /  
Phone: 879-5236 Fax: 627-9236

#### **WESTLAKE (6-8) • site 213**

Principal Maya Taylor / 2629 Harrison Street, 94612 /  
Phone: 879-2213 Fax: 627-9213

#### **WEST OAKLAND MIDDLE (6-8) • site 204**

Principal Neha Ummat / 991 14th Street, 94607 /  
Phone: 879-2204 Fax: 627-9204

### HIGH SCHOOLS

#### **CASTLEMONT HIGH SCHOOL (9-12) • site 301**

Principal Michael Scott / 8601 MacArthur Boulevard,  
94605 / Phone: 879-2301 Fax: 627-9301

#### **COLISEUM COLLEGE PREP (6-12) • site 232**

Principal Amy Carozza / 1390 66th Avenue, 94621 /  
Phone: 879-3232 Fax: 627-9232

#### **DEWEY ACADEMY (11-12) • site 310**

Principal Staci Ross-Morrison / 1111 Second Avenue,  
94606 / Phone: 879-8310 Fax: 627-9310

#### **FREMONT HIGH SCHOOL (9-12) • site 302**

Co-Principals Rosemary Rivera and Tom Skjervheim /  
4610 Foothill Boulevard, 94601 / Phone: 879-2302 Fax:  
627-9302

#### **LIFE ACADEMY (6-12) • sites 245 (6<sup>th</sup>-8<sup>th</sup>) & 335 (9<sup>th</sup>-12<sup>th</sup>)**

Co-Principals Aryn Bowman and Alykhan Boolani /  
2101 35th Avenue, 94601 / Phone: 879-1335 Fax: 627-  
9335

#### **MADISON PARK ACADEMY (6-12) • site 215**

Principal Lucinda Taylor / 400 Capistrano Drive, 94603 /  
Phone: 879-2315 Fax: 627-9315

#### **MCCLYMONDS HIGH SCHOOL (9-12) • site 303**

Principal Jeffrey Taylor / 2607 Myrtle Street, 94607 /  
Phone: 879-2303 Fax: 627-9303

#### **METWEST (9-12) • site 338**

Principal Shalonda Gregory / *Huerta Campus*: 314 East  
10<sup>th</sup> Street, 94606 / Phone: 879-2338 Fax: 627-9338/  
*Huggins Campus*: 2629 Harrison Street, 94612 / Phone:  
879-2338 Fax: 627-9338/

#### **OAKLAND HIGH SCHOOL (9-12) • site 304**

Principal Pamela Moy / 1023 MacArthur Boulevard,  
94610 / Phone: 879-2304 Fax: 627-9304

#### **OAKLAND INTERNATIONAL (9-12) • site 353**

Principal Veronica Garcia / 4521 Webster Street, 94609 /  
Phone: 879-1353 Fax: 627-9353

#### **OAKLAND TECHNICAL (9-12) • site 305**

Principal Richard Fairly / 4351 Broadway, 94611 /  
Phone: 879-2305 Fax: 627-9305

#### **Oakland Tech Fashion Academy**

5263 Broadway Terrace, 94618  
Phone: 879-2305 Fax: 627-9305

#### **RALPH J. BUNCHE ACADEMY (11-12) • site 309**

Principal Dwayne Bartholomew / 991 - 14th Street,  
Building A, 94607 / Phone: 879-2309 Fax: 627-9309

#### **RUDSDALE CONTINUATION SCHOOL (11-12) • site 352**

Principal Willie Thompson / 8251 Fontaine Street, 94605 /  
Phone: 879-2352 Fax: 627-9352

#### **Rudsdale Newcomer • site 354**

Principal Emma Batten-Bowman / 8251 Fontaine  
Street / Phone: 879-2354 Fax: 627-9354

#### **SKYLINE HIGH SCHOOL (9-12) • site 306**

Principal Bianca D'Allesandro / 12250 Skyline Boulevard,  
94619 / Phone: 879-2306  
Fax: 627-9306

#### **STREET ACADEMY (9-12) • site 313**

Principal Bukola Lawal / 417 29th Street, 94609 / Phone:  
879-2313 Fax: 627-9313

### ALTERNATIVE EDUCATION

#### **ALTERNATIVE EDUCATION OFFICE**

Phone: 273-1621 Fax: 273-1698

#### **COMMUNITY DAY SCHOOL (6-12) • site 333**

Principal Dana Sudduth / 4917 Mountain Boulevard,  
94619 / Phone: 879-2333 Fax: 627-9333

#### **GATEWAY TO COLLEGE AT LANEY COLLEGE • site 311**

Director Shawn Taylor / 900 Fallon Street, 94607 /  
Phone: 879-2311 Fax: 627-9311

#### **SOJOURNER TRUTH • site 330**

Principal Willie Thompson / 8251 Fontaine Street, 94605

#### **Independent Study (K-12)**

Phone: 879-5330 Fax: 627-9330

#### **Electronic Learning Program (9-12)**

Phone: 729-4307 Fax: 636-4680

#### **HOME & HOSPITAL PROGRAM**

746 Grand Avenue, Room 4, 94610 /  
Phone: 597-4294 Fax: 597-4296

#### **TEMPORARY ALTERNATIVE PLACEMENT (TAP) CENTER (6-12)**

1011 Union Street, 94607 /  
Phone: 879-8650 Fax: 597-4938

### SPECIAL EDUCATION

#### **SPECIAL EDUCATION OFFICE**

Santa Fe Campus / 915 54th St, 94607 /  
Phone: 879-5003 Fax: 627-9003

#### **BURBANK PRESCHOOL CENTER**

3550 64th Avenue, 94608 / Phone: 879-5004 Fax: 627-  
9004

#### **PRESCHOOL DIAGNOSTIC CENTER**

Adrienne Wroebel, Speech Pathologist / 3550 64th  
Avenue, 94608 / Phone: 879-5004 Fax: 627-9004

#### **CAREER TRANSITION SERVICES**

TSA Leslyn Henry / 2850 West Street, 94608 /  
Phone: 874-3722 Fax: 874-3725

### ADULT EDUCATION

#### **OAKLAND ADULT EDUCATION**

#### **ADMINISTRATIVE OFFICES**

Co-Principals Kim Jones and Angela Taylor  
2607 Myrtle Street, 94607 /  
Phone: 879-1400 Fax: 627-9400

### ENROLLMENT

#### **STUDENT WELCOME CENTER**

746 Grand Avenue, 94610 /  
Phone: 879-4600 Fax: 879-4606

### CENTRAL OFFICE

#### **OFFICE OF THE SUPERINTENDENT**

1000 Broadway, Suite 300, 94607 /  
Phone: 879-8000 Fax: 879-8001



# 1.5 | Measure J and Measure Y Bond Project List

## Measure J Bond Project List and Spending Plan.

See link to Board of Education Agenda meeting on January 27, 2021:

<https://ousd.legistar.com/LegislationDetail.aspx?ID=4741146&GUID=0C6DC13F-6E30-4C7F-A9E0-0F452F782DE1&Options=&Search=>

Attachment A

FACILITIES PLANNING & MANAGEMENT								Board Approved - August 2018								Proposed Changes For January 2021							
All Capital Resources - Summary of changes		Measure J	Measure B \$65M	Fund 35	Fund 25	Measure B Interest	Measure J Interest	TOTAL	Measure J	Measure B \$65M	Fund 35	Fund 25	Measure B Interest	Measure J Interest	TOTAL								
<b>Modernizations and New Construction</b>																							
1	California Solar Initiative (CSI) Project	\$ 31,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 31,000,000	\$ 31,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 31,000,000								
2	Olmstead Elementary School - Replacement	\$ 37,900,000	\$ 11,800,000	\$ -	\$ 10,000,000	\$ -	\$ -	\$ 58,800,000	\$ 37,900,000	\$ 11,800,000	\$ -	\$ 10,000,000	\$ -	\$ -	\$ 58,800,000								
3	Madison Grade Expansion Project (From 8-9 to 8-12)	\$ 15,500,000	\$ 3,200,000	\$ -	\$ 15,700,000	\$ -	\$ -	\$ 34,400,000	\$ 15,500,000	\$ 3,200,000	\$ -	\$ 16,700,000	\$ -	\$ 1,000,000	\$ 36,400,000								
4	Greenleaf Expansion Project (From K-6 to K-8)	\$ 39,480,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 39,480,000	\$ 39,480,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 39,480,000								
5	Banker's Expansion Project (From K-6 to K-8)	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000								
6	Fremont High School - Replacement	\$ 117,000,000	\$ 3,800,000	\$ -	\$ 12,400,000	\$ -	\$ -	\$ 133,200,000	\$ 117,000,000	\$ 3,800,000	\$ -	\$ 12,400,000	\$ -	\$ -	\$ 133,200,000								
7a	Education Learning Complex (ELC2)	\$ 14,820,000	\$ -	\$ 2,880,000	\$ -	\$ -	\$ -	\$ 17,700,000	\$ 14,820,000	\$ -	\$ 2,880,000	\$ -	\$ -	\$ -	\$ 17,700,000								
7b	Interim Housing - 1000 Broadway	\$ 14,480,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,480,000	\$ 22,400,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,400,000								
7c	Cola Administrative Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,120,000	\$ -	\$ 2,880,000	\$ -	\$ -	\$ -	\$ 7,000,000								
8	McClintock HS Intensive Support Site	\$ 2,000,000	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000	\$ 2,000,000	\$ 2,115,000	\$ -	\$ -	\$ -	\$ -	\$ 4,115,000								
9	Castlemont HS Intensive Support Site	\$ 4,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000	\$ 4,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000								
10	Brookfield ES Intensive Support Site	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000								
11	Frick MS Intensive Support Site	\$ 2,000,000	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000	\$ 2,000,000	\$ 2,400,000	\$ -	\$ -	\$ -	\$ -	\$ 4,400,000								
12	Central Kitchen/Commissary at Foster	\$ 48,500,000	\$ 22,500,000	\$ -	\$ -	\$ -	\$ -	\$ 71,000,000	\$ 48,500,000	\$ 27,000,000	\$ -	\$ -	\$ -	\$ -	\$ 75,500,000								
13	School Kitchens 1 & 2	\$ 7,775,000	\$ 25,000,000	\$ -	\$ -	\$ -	\$ -	\$ 7,775,000	\$ 7,750,000	\$ -	\$ -	\$ -	\$ -	\$ 25,000,000	\$ 7,775,000								
14	Roosevelt Modernization (Design Only)	\$ -	\$ 1,000,000	\$ 2,880,000	\$ -	\$ -	\$ -	\$ 1,000,000	\$ -	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000								
	<b>Subtotal</b>	\$ 338,330,000	\$ 48,325,000	\$ 2,880,000	\$ 38,100,000	\$ -	\$ -	\$ 427,635,000	\$ 342,850,000	\$ 53,315,000	\$ 2,880,000	\$ 39,100,000	\$ -	\$ 1,625,000	\$ 439,770,000								
<b>Security Projects</b>																							
15	Security Camera Plan (Design Only)	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000								
16	Security Improvement District Wide	\$ 2,000,000	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000	\$ 2,000,000	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000								
	<b>Subtotal</b>	\$ 2,500,000	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,500,000	\$ 2,500,000	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,500,000								
<b>Energy and Technology</b>																							
17	Phase 39 Energy Efficiency	\$ 8,625,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,625,000	\$ 8,625,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,625,000								
18	Educational Technology	\$ 2,000,000	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000	\$ 2,000,000	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000								
19	Technology and Common Core	\$ 7,200,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,200,000	\$ 7,200,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,200,000								
20	Technology Infrastructure Upgrades	\$ 2,500,000	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ 5,000,000	\$ 2,500,000	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ 5,000,000								
	<b>Subtotal</b>	\$ 20,325,000	\$ 3,500,000	\$ -	\$ -	\$ -	\$ -	\$ 23,825,000	\$ 20,325,000	\$ 3,500,000	\$ -	\$ -	\$ -	\$ -	\$ 23,825,000								
<b>Other Capital Improvements</b>																							
21	Paving and Infrastructure	\$ 5,863,066	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,863,066	\$ 5,863,066	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,863,066								
22	Bathroom Renovations	\$ 2,800,000	\$ -	\$ 1,700,000	\$ -	\$ -	\$ -	\$ 4,500,000	\$ 4,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,500,000								
23	King Estates Portable Demo	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 115,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 115,000								
24	Roofing Projects	\$ 1,564,647	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,564,647	\$ 1,564,647	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,564,647								
25	Frustrate ES Bleachers/Restrooms	\$ 912,740	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 912,740	\$ 912,740	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 912,740								
26	Child Development Centers Improvements - Laurel	\$ 3,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,500,000	\$ 3,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,500,000								
27	Boiler Replacements	\$ 1,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,500,000	\$ 1,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,500,000								
28	DSA Legacy	\$ -	\$ -	\$ 550,000	\$ -	\$ -	\$ -	\$ 550,000	\$ -	\$ -	\$ 150,000	\$ -	\$ -	\$ -	\$ 400,000								
29	Mobile Modular Legacy	\$ -	\$ -	\$ 204,000	\$ -	\$ -	\$ -	\$ 204,000	\$ -	\$ -	\$ 204,000	\$ -	\$ -	\$ -	\$ 204,000								
30	ADA Upgrades	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000								
31	Health Clinic - Oakland Tech	\$ 300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 300,000	\$ 300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 300,000								
32	Joaquin Miller ES Playstructure	\$ 80,917	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 80,917	\$ 80,917	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 80,917								
33	Clermont MS Kitchen Fire	\$ 1,500,000	\$ 1,500,000	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000	\$ 1,500,000	\$ 1,500,000	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000								
34	Science Classrooms and Labs	\$ 3,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000	\$ 3,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000								
35	Playmatting and Playstructures	\$ 3,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000	\$ 3,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000								
36	Manzanita ES Play Area	\$ 200,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 200,000	\$ 200,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 200,000								
37	Bella Vista ES Portable Removal	\$ 973,998	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 973,998	\$ 973,998	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 973,998								
38	Skyline HS Gym Roof	\$ 450,000	\$ -	\$ 200,000	\$ -	\$ -	\$ -	\$ 650,000	\$ 450,000	\$ -	\$ 200,000	\$ -	\$ -	\$ -	\$ 650,000								
	<b>Subtotal</b>	\$ 26,245,368	\$ 1,500,000	\$ 2,654,000	\$ -	\$ -	\$ -	\$ 30,399,368	\$ 28,000,368	\$ 1,600,000	\$ 554,000	\$ -	\$ -	\$ 1,300,000	\$ 31,514,368								
<b>Field Projects</b>																							
39a	Turf Field Replacement - Skyline HS	\$ 1,929,463	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,929,463	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,929,463								
39b	Turf Field Replacement - Oak Tech HS Field	\$ -	\$ 1,850,000	\$ -	\$ -	\$ -	\$ -	\$ 1,850,000	\$ 1,850,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,850,000								
39c	Turf Field Replacement - Castlemont HS & McClintock HS	\$ 2,400,000	\$ 1,000,000	\$ 2,000,000	\$ 600,000	\$ -	\$ -	\$ 6,000,000	\$ 2,400,000	\$ 1,000,000	\$ 2,600,000	\$ -	\$ -	\$ -	\$ 6,000,000								
40	Carrier @ Oakland International HS Turf Replacement	\$ 1,800,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,800,000	\$ 1,843,517	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,843,517								
41	Barbuck ES Site Improvements	\$ 2,078,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,078,000	\$ 2,078,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,078,000								
42	Parker ES Astro Turf Installation	\$ 1,734,800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,734,800	\$ 1,734,306	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,734,306								
43	Scoreboard at Fields	\$ 89,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 89,250	\$ 89,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 89,250								
44	Middle School Fields	\$ 5,525,000	\$ 2,925,000	\$ -	\$ -	\$ -	\$ -	\$ 8,450,000	\$ 5,453,000	\$ 1,372,000	\$ -	\$ -	\$ -	\$ -	\$ 6,825,000								
45	Emerson Field	\$ 2,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000,000	\$ 2,000,000	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ 4,000,000								
	<b>Subtotal</b>	\$ 17,555,573	\$ 5,775,000	\$ 2,000,000	\$ 600,000	\$ -	\$ -	\$ 25,930,573	\$ 17,527,530	\$ 4,585,000	\$ 3,600,000	\$ -	\$ -	\$ 637,000	\$ 26,349,530								
46	Lead Abatement	\$ 2,300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,300,000	\$ 2,300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,300,000								
47	Bond Program Contingency	\$ 7,000,000	\$ 2,900,000	\$ -	\$ -	\$ 2,000,000	\$ 2,500,000	\$ 14,400,000	\$ -	\$ 990,000	\$ -	\$ -	\$ 1,221,000	\$ 1,880,037	\$ 3,597,037								
48	Bond Program Coordination	\$ 59,244,059	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ 59,244,059	\$ 59,537,096	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 59,244,095								
49	Facility Master Plan	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000	\$ 2,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500,000								
50	Lincoln Water Intrusion	\$ -	\$ -	\$ 2,210,000	\$ -	\$ -	\$ -	\$ 2,210,000	\$ -	\$ -	\$ 2,210,000	\$ -	\$ -	\$ -	\$ 2,210,000								
51	Ralph Bunche CTE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 600,000	\$ -	\$ -	\$ 100,000	\$ 700,000								
52	Prior Board Approved Alarm Projects	\$ -	\$ -	\$ -	\$ -	\$ 7,480,000	\$ -	\$ 7,480,000	\$ -	\$ -	\$ -	\$ -	\$ 9,480,000	\$ -	\$ 15,480,000								
	<b>Subtotal</b>	\$ 475,000,000	\$ 65,000,000	\$ 9,744,000	\$ 38,700,000	\$ 9,480,000	\$ 2,500,000	\$ 606,424,000	\$ 475,000,000	\$ 65,000,000	\$ 10,140,000	\$ 45,700,000	\$ 10,701,000	\$ 5,949,000	\$ 612,490,000								

See link to Board of Education Agenda meeting on April 14, 2021:

<https://ousd.legistar.com/LegislationDetail.aspx?ID=4854174&GUID=A0083024-DFB5-4D07-B42F-AA91C14E4BB4&Options=&Search=>



OAKLAND UNIFIED  
SCHOOL DISTRICT  
Community Schools, Thriving Students

## Measure Y Spending Plan April 2021



[www.ousd.org](http://www.ousd.org)     @OUSDnews

## Measure Y Spending Plan

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- This initial Measure Y Spending Plan is presented to Board for approval.
- Approval of a spending plan is needed to start the preconstruction activities for projects authorized in Measure Y
- Note: Laurel CDC, Claremont MPR, and Cole Central Administration all have planning funds authorized in Measure J.

## Measure Y Spending Plan

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- This spending plan is based on the following two documents:
  - Measure Y Bond Ballot language
  - Board approved preliminary project budgets (June 2020)

## Measure Y Spending Plan

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- In this initial spending plan we are requesting:
  - full project funding for projects with preconstruction already completed:
    - Cole Central Admin (DSA approved)  
(or funding for alternate central admin project)
    - Claremont MPR (DSA approval projected September 2021)
    - Laurel CDC (DSA approval projected December 2021)
  - full pre-construction funding for projects with confirmed educational programs
    - we need to complete pre-construction tasks to return to Board with project budgets that incorporates all costs

## Measure Y Spending Plan

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- We will be returning to Board on a regular basis to update the spending plan as full project scopes and budget are finalized. We need approval of this initial spending plan to start the process and follow through on Measure Y.

# Proposed Spending Plan April 2021

Measure Y - April 2021 Proposed Spending Plan and Drawdown							
Site or Project Name	Project Type or Category	1st Draw May 2021	2nd Draw, May 2023	3rd Draw, June 2025	4th Draw, May 2027	Preliminary Budget	% of total bond
CCPA	Site Expansion	\$ 35,500,000	\$ -	\$ -	\$ -	\$ 35,500,000	4.83%
Claremont MS	Cafeteria/MPR	\$ 18,000,000	\$ -	\$ -	\$ -	\$ 18,000,000	2.45%
Elmhurst United MS	Site Modernization	\$ 1,000,000		\$ 9,000,000		\$ 10,000,000	1.36%
Garfield ES	Site Renovation	\$ 5,670,000	\$ -	\$ 20,800,000	\$ 30,230,000	\$ 56,700,000	7.71%
Hilcrest ES	New Kitchen	\$ -	\$ -	\$ 170,000	\$ 1,530,000	\$ 1,700,000	0.23%
Laurel CDC	Site Renovation	\$ 11,500,000				\$ 11,500,000	1.56%
Marcus Foster ELC	Site Specific Projects	\$ -	\$ 1,500,000		\$ 13,500,000	\$ 15,000,000	2.04%
McClymonds HS	Site Renovation	\$ 6,500,000	\$ 20,000,000	\$ 38,500,000		\$ 65,000,000	8.84%
Melrose Leadership Acad.	Site Expansion	\$ 4,950,000	\$ 15,000,000	\$ 29,550,000		\$ 49,500,000	6.73%
Roosevelt MS	Site Renovation	\$ 7,600,000	\$ 63,000,000	\$ -	\$ -	\$ 70,600,000	9.61%
Piedmont ES	New Kitchen	\$ -	\$ -	\$ 200,000	\$ 1,800,000	\$ 2,000,000	0.27%
Skyline HS	ADA Compliance / Seismic	\$ 1,000,000	\$ 5,000,000	\$ 3,000,000	\$ 1,000,000	\$ 10,000,000	1.36%
Permanent Central Admin	Central Admin Placeholder	\$ 50,000,000				\$ 50,000,000	6.80%
Access and Quality Imp.	Support for school Expansions/Consolidations	\$ 1,000,000	\$ 3,000,000	\$ 3,000,000	\$ 3,000,000	\$ 10,000,000	1.36%
District Wide Initiatives	Facilities & Tech Imp.	\$ 9,000,000	\$ 32,000,000	\$ 32,000,000	\$ 33,000,000	\$ 106,000,000	14.42%
	Health & Safety Upgrades	\$ 5,000,000	\$ 13,000,000	\$ 14,000,000	\$ 13,000,000	\$ 45,000,000	6.12%
	Energy Eff. & Sustainability	\$ 5,000,000	\$ 12,000,000	\$ 11,000,000	\$ 11,000,000	\$ 39,000,000	5.31%
	Utilization Improvements	\$ 1,000,000	\$ 3,000,000	\$ 3,000,000	\$ 3,000,000	\$ 10,000,000	1.36%
Bond Program Contingency	For Unanticipated costs.	\$ 8,500,000	\$ 24,000,000	\$ 10,150,000	\$ 30,850,000	\$ 73,500,000	10.00%
Bond Program Management	Project & Const. Managers, Facilities Admin & Mgmt. Staff	\$ 14,000,000	\$ 14,000,000	\$ 14,000,000	\$ 14,000,000	\$ 56,000,000	7.62%
<b>TOTALS</b>		<b>\$ 185,220,000</b>	<b>\$ 205,500,000</b>	<b>\$ 188,370,000</b>	<b>\$ 155,910,000</b>	<b>\$ 735,000,000</b>	<b>100%</b>



# Quality Schools in Every Neighborhood!



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## 1.6 | Local Agency Contacts

### DSA Headquarter Phone Roster:

Name	Phone	Role
Ida Clair	(916) 322-2490	State Architect
Susanna Medina	916-445-9290	Performance Metrics & Certification Outreach Supervisor
Laurel Brode	(916) 324-7180	Special Projects (Supervisor)
Dessa Rooney	(510) 622-3109	Oakland Regional Manager
Darrell Fusselman	(510) 622-5633	Business Services (Supervisor)
Dan Chu	(510) 622-3126	Project Services (Supervisor)
Susan Pae	(510) 622-1830	Fire & Life Safety (Supervisor)
Kris Wen	(510) 622-0729	Access Compliance (Supervisor)
Richard Denio	(510) 286-5845	Structural Safety (Supervisor)
Chris Morton	(510) 622-3617	Structural Safety (Supervisor)
Natan Litinskiy	(510) 622-3115	Field Team (Supervisor)
Sacramento Office	(916) 445-8730	N/A
Los Angeles Office	(213) 897-3995	N/A

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## 1.7 | Governing State Agencies' and Local Entities' Websites:

### 1. OAKLAND UNIFIED SCHOOL DISTRICT (OUSD)

Website Address: <http://webportal.ousd.k12.ca.us>

Phone Number: 510-879-8200

### 2. LOCAL BUSINESS UTILIZATION – LUSTER AND LOWE

Website Address: <https://www.ousd.org/Page/19463>

Phone Number: 510-593-8181

### 3. PROJECT LABOR AGREEMENT – DAVILLIER-SLOAN

Website Address: <https://davilliersloan.com/services/>

Phone Number: 510-835-7603

### 4. California Department of Education (CDE)

Website Address: <http://cde.ca.gov>

Phone Number: 916-319-0800

### 5. Division of State Architect (DSA)

Website Address: <https://www.dgs.ca.gov/DSA>

Phone Number: 916-445-8100

510-622-3001 San Francisco Bay Area Regional Office

### 6. Department of Toxic Substance Control (DTSC)

Website Address: <http://www.dtsc.ca.gov>

Phone Number: 800-72-TOXIC or 728-6942

### 7. Department of Industrial Relations (DIR)

Website Address: <http://www.dir.ca.gov>

Phone Number: 415-703-5070

### 8. Coalition of Adequate School Housing (CASH)

Website Address: <http://www.cashnet.org>

Phone Number: 949-448-8577

**9. Alameda County Health Agency**

Website Address: <http://www.acgov.org>

Phone Number: 510-567-6700

**10. Pacific gas and electric**

Website Address: <https://www.pge.com/>

Phone Number: Business customer service, 1-800-468-4743

**11. Educational Resources Information Center (ERIC)**

Website Address: <http://www.eric.ed.gov>

Phone Number: 800-LET-ERIC or 538-374

**12. Association for Learning Environment**

Local Chapter: Northern California / Nevada

Website Address: <https://www.a4le.org>

Phone Number: 408-391-0840

**13. CALIFORNIA ASSOCIATION SCHOOL BOARD OFFICIALS**

<https://www.casbo.org>

(916) 447-3783

## 1.8 | Job Descriptions

### **Program Managers:**

The Program Manager provides input on Facilities Master Plan development including the prioritization of projects, development of educational adequacy, ADA transition plan implementation, and utilization modeling. The program manager advises the district on phasing, grouping of projects, and other potential cost-saving approaches to construction. They manage and report to accountable school district committees. They will verify and update the cost estimates in the Facilities Master Plan, develop and maintain bond program spending plan, and develop a master project communication plan. The Program Managers are responsible for the following general categories of work

- i. Capital program management and advice
- ii. Master Planning
- iii. Monitoring and oversight of Construction Managers
- iv. Design phase management
- v. Pre-construction management
- vi. Construction phase coordination
- vii. Post-construction phase completion
- viii. Support the local business program

### **LBU Specialist:**

The LBU Specialist manages and implements the Local Business Utilization Policy established by the Board of Education for the Oakland Unified School District.

### **Project Accountant II and III:**

The Project Account II and III differ primarily in experience. These roles perform a wide variety of complex analyses, budgetary, and accounting duties related to the construction projects under the Bond. Some tasks include, but not limited to, financial reporting and evaluations, fiscal reporting, schedules, statements, forecasts and claims. Manage accounts receivable, analyze cash balances and fund requirements, advise and assist in the financial administration of projects and or accounts.

### **Principal Account Clerk:**

In support of the Facilities department, the Principal Account Clerk supervises and participates in the compiling, analyzing, processing and recording of financial transactions; coordinates the operations of function for which responsible with district, regional, school site, county, and other officials; handles unusual or difficult problems referred by subordinates; instructs, assigns and schedules tasks to clerical employees and reviews the work for accuracy and completeness; posts and maintains budget spreadsheets and control ledgers; balances accounts and takes trial balances; prepares financial and statistical reports and statements; interprets and applies appropriate rules and regulations; answers questions and issues instructions regarding accounting and statistical procedures and related budget matters.

### **PLA Consultant:**

The PLA Consultant will work with the District staff to oversee the following processes in addition to other tasks required to maintain compliance with the PLA.

**Managing labor Relations:**

- i. Maintain open and regular communications with signatory unions and their representatives
- ii. Work closely with non-union contractors to ensure that they will be able to use both their “core” employees and to integrate skilled union members into their work crews
- iii. Collect all required documents and schedule pre-job meetings prior to the initiation of project activity.
- iv. In support of the Joint Administrative Committee schedule quarterly meetings, distribute meeting materials, and submit JAC meeting report for upload to the district website and District archives.

**Coordinating the PLA’s workforce development and employment programs**

- i. Conduct construction career outreach presentation to increase awareness of the construction industry as a viable, high wage-earning industry.
- ii. Update and maintain contact lists of workforce development organizations that contractors can utilize. Participate in a minimum of one construction career presentation each month in varying locations of Oakland.
- iii. Assist, encourage, and support coordination between the District’s CTE program and the Alameda County BTC’s affiliated union apprenticeship programs.
- iv. Work with District staff, track trust fund contribution funding levels, and prepare a quarterly report on the status of contractors contributions to be shared at the JAC meetings.

**Monitoring and Reporting**

- i. Provide monthly activity reports to the executive director of Facilities Planning & Management and Program Manager highlighting local hire compliance, corrective action plans, and Good Faith Efforts made by contractors.
- ii. Prepare final close-out reports.

**Certified Payroll Coordinator:**

**Facilities Procurement Manager:**

The Facilities Procurement Manager coordinates with and supports the Bond Program Manager, District Leadership, and PM/CM in an effort to develop and solicit requests for proposals. They also coordinate efforts related to LBU requirements on Bond Program procurements.

**Facilities Contracts and Bids Specialist:**

The Facilities Contracts and Bids Specialist manages the District’s construction projects bidding and contracts as mandated by state and federal laws, local ordinances, and best practices for public sector construction procurement projects. The Specialist plays a major role in the District’s proposal processes, and handles the certifications, insurance, regulatory and compliance requirements for the District.

**Contract Specialist:**

Perform high responsible professional and technical duties in the coordination, solicitation and administration of the Facilities contract procurement process; organize, prepare, and maintain complex contracts for materials, construction projects and

professional services, including architectural, engineering, and consulting services. Perform a variety of specialized buying assignments; serve as a subject matter expert and resource to staff.

Perform a variety of complex, specialized duties requiring excellent communication skills; utilize specialized knowledge and independent judgement involving frequent and responsible public contact; responsible for the preparation tracking and organizing of all facility acquisition and construction related agreements and/or contracts for legal review and Board approval; utilize various computer software programs.

**Project Managers:**

Each project manager will manage multiple projects. A staff of project engineers will support the managers with the daily design and construction-related activities. The manager will manage each project from design through closeout, coordinating and communicating with key stakeholders, site staff, architectural staff, inspector of records, the general contractor, and various other vendors and consultants. A key responsibility of the manager is to ensure complete, biddable, and buildable drawings sets are provided to the Division of the State Architect or the local permitting office. The sets are inclusive of all constructability comments and review comments from stakeholders. Project managers will coordinate closely with the program and construction management teams to ensure continuity of project design and project expectations. It is the responsibility of the project manager to deliver a complete project within the established project budget and schedule. In coordination with the document control coordinator, the project manager and/or the construction manager will code all project files for filing by the coordinator

**Construction Manager:**

The Construction manager will plan, coordinate, budget, and supervise construction projects throughout the District. The construction manager will advise the District on regulatory requirements from agencies that have jurisdiction over the project. The manager will coordinate and implement the project with local and state agencies like the Division of the State Architect and the Office of Public School Construction. The manager will manage cost estimates, constructability reviews, studies, reports, projections, and opinions of probable construction cost for the project. The manager will coordinate and communicate with key stakeholders, site staff, architectural staff, inspector of records, the general contractor, and other agencies having jurisdictional authority to complete the project on time and on budget. In coordination with the document control coordinator, the project manager and/or the construction manager will code all project files for filing by the coordinator. The manager will also coordinate with the District on all activities related to other concurrent projects in accordance with the District's Master Plan.

**Project Engineer:**

The project engineer will assist the project managers. The engineer will be responsible for preparing the meeting agendas two business days prior to a meeting and deliver meeting minutes within two business days after the meeting. If necessary, the engineer

will also document and track all the pertinent documents on a project (e.g., requests for information (RFI), architect supplemental instructions (ASI), and addenda.) A primary duty of the engineer is to process and review all invoices on a project. The engineer will also assist with the coordination with Buildings & Grounds and serve as the coordinator for local agencies (e.g., PG&E and EBMUD). The engineer will also lead the project closeout phase which includes closeout with the Division of the State Architect, the collection of as-built drawings, provision of attic stock, and development of operations and maintenance manuals.

**Facility Contracts and Bid Specialist:**

The Facilities Contracts and Bids Specialist manages the District's construction projects bidding and contracts as mandated by state and federal laws, local ordinances, and best practices for public sector construction procurement projects. The Specialist plays a major role in the District's proposal processes, and handles the certifications, insurance, regulatory and compliance requirements for the District.

**Document Control Coordinator:**

The document control coordinator will maintain and manage the District's plan room, which will contain copies of all the Division of the State Architect's (DSA's) approved drawings, specifications, and as-built drawings. The coordinator will maintain an electronic database of all the DSA-approved drawings and as-built drawings on the district's main server. The coordinator will maintain a library of all project operations and maintenance manuals for all completed projects. The coordinator will scan all relevant documents for DSA closeout and Office of Public School Construction audits. The coordinator will file all documents generated on any given project once coded by the project manager and/or construction manager.

Documents include by not limited to:

- Submittals
- Warranties
- Manuals
- As-built drawings
- DSA Forms

## 1.9 | Consultant Attendance Tracking Policy

1. A consultant's typical work hours are from 8:00 AM to 5:00 PM, Monday to Friday. The consultant should be available during these times and also available via cell phone when not on District premises.
2. If a consultant is late or absent, they shall notify the executive assistant and the executive director of Facilities Planning & Management via e-mail.
3. All consultants are responsible for updating the daily attendance board located in the leadership suite. Examples for signing out would be: site visits, project meetings, or doctor's appointment. When a consultant has an early morning appointment, they should sign out the day before or notify the office to have someone put their name down, as well as state where they will be that morning.
4. If a consultant is out for any reason, either vacation (48-hour notice) or sick, they should fill out the consultant absence form for consultants when they return to work. This form is located on the G: Drive under the 2021 Standard Forms/General Administrative Forms folder. The file is named *Consultant Absence Form*. This form must be signed by the consultant and the consultant's supervisor, who will then submit it to the executive director of Facilities Planning & Management for sign off.
5. If a consultant has a need to be away from the office for any reason, they should notify the executive director of Facilities Planning & Management and make sure the consultant is marked on the attendance board as out.

*See sample below*

**OAKLAND UNIFIED SCHOOL DISTRICT  
CAPITAL IMPROVEMENT PROGRAM**

**ABSENT REQUEST FORM FOR CONSULTANTS**

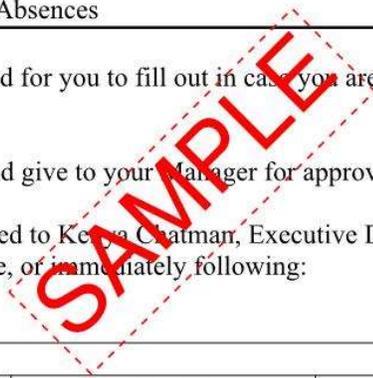
To: Facilities Consultants  
 From: Kenya Chatman, Executive Director of Facilities  
 Re: Consultants Absences

This form has been created for you to fill out in case you are absent for vacation, sick leave, jury duty, etc.

Please fill out the form and give to your Manager for approval.

This form will be submitted to Kenya Chatman, Executive Director of Facilities, prior to the day of absence, if possible, or immediately following:

Name: \_\_\_\_\_



Date of Absence	Reason for Absence	Hours

Consultant Signature: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_

Director of Facilities Signature: \_\_\_\_\_

## 1.10 | Filing Procedure for Project Documentation

### **Electronic Document Filing (preferred method):**

1. At the beginning of a project, the project manager notifies the documents control coordinator of the new project. The coordinator will set up the electronic file folders for the project on the P: drive under the folder: Project Files.
2. The project files location is the top-level folder for a site. Each identified project will be a subfolder underneath. Within this project-specific folder is a set of subfolders that match the project file index.
3. At a minimum, all items listed in the following table, as well as all items on the project file index that have a star next to them, must be scanned and stored/filed under P: drive\Project Files Folder. (All documents should be saved in project files.)

### **Paper Document Filing:**

1. All paper documents that are to be filed must be appropriately coded per the *project file index* standards before being submitted to the documents control coordinator for filing. Each project team should have a file coding stamp for this activity.
2. All paper documents that are to be filed for a project should be given to the documents control coordinator throughout the duration of the project, to be electronically filed.

### **Critical documents that must be in the project files:**

1. New Project Authorization and Design & Construction Authorization Forms
2. Agreement & Amendment Requests
3. Vendor Invoices & Contractor Pay Applications
4. Bid Invitation & Bid Results
5. Certificate of Substantial Completion
6. Final Completion Form
7. Project Contact List
8. Stop Notices
9. Geotech and Solid Reports
10. Testing Reports & DSA Verified Reports

### **Drawing & Specification Filing - Bid Package Drawings & Specifications:**

1. Provide one full-size set of the bid package drawings and one complete specification manual to the documents control coordinator. The coordinator will log these in the plan room log and file in the plan room.

### **Electronic Drawing CAD Files:**

1. Provide a digital link or flash drive that contains the CAD files and PDF to the documents control coordinator. The coordinator will log and file them in the outer project file room.

### **As-Built Drawings:**

1. Provide one full-size set of the project's as-built drawings to the documents control coordinator. The architect and the project inspector must sign the as-built drawing set. Once signed, the documents control coordinator will log and file them in the plan room.

## 1.11 | Account-Ability Workflow Process

### Purpose:

The Account-Ability Workflow & Process provides the project team with steps to follow when using Account-Ability for their projects and clarifies roles and responsibilities.

### Creating a Project in Account-Ability:

A project is created in Account-Ability (AA) by the project manager or project engineer assigned to the project.

1. On the home screen of AA, select the "New" box on the left side of the screen under the Project Navigator.
2. Enter the following information in the "Project Detail – New Project" box:
  - School Name: Also known as the campus name (e.g., Frick Campus)
  - Short Name: The site number - project number (e.g., 219 – 15105)
  - Project Name: The scope of the project (e.g., Intensive School Support)
  - Description: Optional, can provide further project information.
  - District: Must provide one of the following statuses:
    - 1. Planning
    - 2. Construction
    - 3. Close Out
    - 4. Complete
    - 5. Future Project
  - Permit 1#: Optional, can provide DSA or OPSC number if relevant.
  - Permit 2#: Optional, can provide DSA or OPSC number if relevant.
  - Start Date: The start date of the project is the start of the fiscal year in which the earliest project expense occurs.
  - Duration: The number of fiscal years.
3. After this information is inputted, select "Save" and close the box.
4. To edit project details for a project that has been created, select the project to open. On the right side of the screen, select "Edit Project."

After the PM/CM/PE has created the project in AA, they should notify the accountant assigned to the project to inform them that it has been created and request that the budget be created.

### Creating a Contract in Account-Ability:

A contract is created in AA by the project manager or project engineer assigned to the project.

1. Select and then open the project in the Project Navigator.
2. Select the "Contracts" tab on the right side of the screen, then select "New" below the contracts menu.
3. Enter the following information for the contract:
  - Vendor: Select the appropriate vendor.

- If the vendor is not in the vendor menu, select the yellow menu to the right of the drop-down arrow and fill in the "*Vendor Detail – New Vendor*" information.
  - Contact: Select the available contact or add a new contact using the menu to the right of the drop-down arrow.
  - Contract Date: The start date of Board Approval.
  - NTP Date: The date contained in the NTP that the project will commence.
  - Duration Days : The number of days of the contract. Entering the number of days for the contract will auto-fill the end date.
  - CC Date: The contract end date. Entering the contract end date will auto-fill the duration days if a number was not already entered.
  - NOC Date: The date which Alameda County records the NOC.
  - Initial Contract: The total amount of the contract.
4. Proceed to the box on the right side of the screen to enter the following information:
- Contract Name: This is auto filled based on the contractor's name but can be customized here for quick reference.
  - Object Code: To be selected by the PM/CM/PE based on the contract type. If the PM/CM/PE is unsure which object code to select, consult with the project accountant.
  - Contract Type: Select one of the following options:
    - Professional Services
    - Construction
    - Supply/Other
  - RG: The Routing Group, which has several groups that populate the transmittal sheets. The default is Budget Adj-Board.
  - SI: The Special Instruction describes how payments will be handled. Select the most appropriate option, most often "*Mail Check to Company.*"
  - Initial Contract Authorization: PM/CM/PE will input the date, which is the contract date.
5. After entering the appropriate information in the boxes, select "*Create Contract.*" If any red flags appear, complete the required information before selecting "*Create Contract*" again.
6. The PM/CM/PE will save the contract, but they do not post it. After the contract has been created, the PM/CM/PE will contact the project accountant and request them to enter the account string and connect the contract to the budget.
7. The PM/CM/PE will create the transmittal sheet using the following steps. The transmittal sheet is used when routing the contract/agreement request with appropriate attachments for approval and processing.

To create the transmittal sheet for the contract, on the contract page, select

"Reports" in the box on the right side of the page, then select "Transmittal/Contract Record." On the Reports page, select the following.

- Verify that the correct project and contract are checked.
  - On the right side of the page, select the printer you would like to print to and check the box for "Color" to print the report in color.
  - Under "Report Options," use the drop-down menu under "Transmittal for" to select which type of report you want to create. (The default is Payment Request.) Select "Contract Report" to create the cover sheet for the contract.
  - Check the boxes for additional details that you want to include in the report.
8. After selecting these options, click either "Preview" to review the report before printing or "Print" to print the report.

After the contract has been approved by the executive director of Facilities Planning & Management, deputy chief of Facilities, and the Board of Education, the PM/CM/PE notifies the project accountant that the Contract is ready to post in AA. The project accountant will create the PO number, link the contract to the project budget (if this has not already been performed), and post the contract.

#### Processing Invoices and Pay Applications in Account-Ability:

An invoice or pay application is processed in AA by the project manager or project engineer.

To process an invoice or pay application, the contract must be linked to the budget, have a PO, and be posted. If this is not the case, the PM/CM/PE should discuss the issue with the project accountant.

1. Select and open the project in the Project Navigator. Select the "Contracts" Tab, then select and open the contract associated with the invoice/pay application.
2. In the box on the right side of the screen, select the "Transactions" tab, then select "Add New Invoice."
3. In the "New Invoice" box, provide the following information:
  - Inv#: The invoice or pay application number.
  - Date: The date of the invoice or payment application.
  - Inv Amt: The amount of the invoice or payment application.
  - PO #: Use the drop-down menu to select the appropriate PO.
  - Description: Enter a description for the payment, if appropriate.
  - RG: The routing group for the payment cover sheet. Select the appropriate group.
  - SI: The special instruction for processing the payment. Select the appropriate instruction, which is most often "Mail Check to Company."
  - Amt To Pay: If different from the payment request amount, enter the amount to be paid.

4. After the payment request information has been entered, select "Save."
5. To create the transmittal sheet for the payment request, on the Contract page, select "Reports" in the box on the right side of the page, then select "Transmittal/Contract Record." On the Reports page, select the following:
  - Verify that the correct project and contractor are checked.
  - On the right side of the page, select the printer you would like to print to and check the box for "Color" to print the report in color.
  - Under "Report Options," use the drop-down menu under "Transmittal for" to select which type of report you want to create. The default is Payment Request, which is used for invoices and pay applications.
  - Check the boxes for additional details that you want to include in the report.
  - Check the box for the invoice or pay application that you want to create.
6. After selecting these options, click either "Preview" to review the report before printing or "Print" to print the report.

Invoices and pay applications should be routed for processing using the payment request report as the cover sheet, including all appropriate attachments.

#### Linking a Project to ColbiDocs:

Linking a project in AA to ColbiDocs is performed by the project manager or project engineer.

The threshold for linking a project to ColbiDocs is a total budget of \$5 million or above. If the project's budget is below \$5 million, the project manager should consult with the executive director of Facilities Planning & Management or program manager to discuss using ColbiDocs.

1. Select and open the project in the Project Navigator.
2. On the right side of the screen, select "Edit Project."
3. In the top right corner of the Project Detail Window, check the "ColbiDocs Linked" box.
4. Select "Save" and close the project detail box.

#### Additional Resources:

For additional resources, please see the AA instruction manuals found on the following sites:

1. The AA website (<https://aa3.colbitech.com/logon/LogonPoint/index.html>).
2. The Facilities network (T:\G\pdata\AccountAbility Manuals).



2.0

**ACCOUNTING AND PAYMENTS**

## 2.1 | Invoice Payment Process

### Invoice In-Take Process:

1. When an invoice is received, it is date stamped, stickered with a barcode, and scanned into the invoice tracker in the mailroom.
2. The project manager reviews and approves the invoice, enters it into Account-Ability, submits a hard copy with backup documents to the principal account clerk, and updates the status in Invoice Tracker.
3. The project engineer or project manager saves the document on the server in Project Files with the date and description. (e.g., 09.21.2022).
4. Approved invoices should contain the following information:
  - Payment request transmittal sheet generated in Account-Ability,
  - Project manager authorization stamp with all sections completed, including date of approval and project managers contact information,
  - Date and time stamp from the mailroom,
  - Barcoded and entered into Invoice Tracker,
  - Consultant status report showing current contract amount, the total payment to date, and the remaining balance,
  - Backup documentation justifying hours billed,
  - LBU calculation worksheet (see sample below),
  - Certified payroll letter, if needed,
  - PLA / Workforce check, if needed,
  - If applicable, change order or amendment attached to a copy of the invoice, and
  - Approved contract or purchase order,
  - Conditional and un-conditional lien-waiver, as applicable.
5. The principal account clerk prepares the cover sheet, routes the invoice for signatures, updates the status in Invoice Tracker, and submits it to the Central Accounts Payable for check issuance.
6. It is the responsibility of the respective staff accountant to communicate directly with the project manager concerning any missing, incomplete, and/or non-compliant documentation or issues related to policy.
7. The staff accountants will establish monthly check-in meetings with their respective project managers to review and reconcile financial information.
8. The accounting manager is available for any clarifications.

### Procedure for Invoice Rejection:

If an invoice is unacceptable for any reason, the following process shall be completed:

1. The principal account clerk, PM, CM, or PE returned the invoice to the vendor by e-mail within three business days accompanied by the invoice rejection text. CC the principal account clerk, PM, CM, or PE.
  - a. Reasons for rejection may include any of the following:
  - b. Billing in not supported by contract (term/rate)
  - c. Invoice exceeds available balance
  - d. Duplicate invoice number
  - e. Missing supporting documentation
  - f. Other
2. The vendor may revise and resubmit. The 30-day remittance window restarts.
3. Principal account clerk is responsible for tracking the open invoice until resolved.

### Procedure for Regular or Overtime Labor Hours from Buildings & Grounds (B&G), Custodian, and Nutritional Services Departments:

1. Any project in an existing or occupied school that is part of a bond construction process and utilizes the B & G, Custodial, or Nutritional Services departments must have a PM, CM, or PE verify that the scope of work is caused by new construction. Alternatively, if the scope of work is an existing maintenance-related issue, the PM, CM, or PE should notify the B & G department or other departments accordingly.
2. If the scope of work is determined to be, by the PM or CM,
  - a. Related to, caused by, or out of contract documents, or
  - b. Determined to be beneficial to the schedule or costs, then the PM, C M, PE should review with the executive director of Facilities Planning & Management and the appropriate department heads before moving forward.
3. The PM or CM will request a quote for the services from the applicable department doing the work. The PM or CM will verify the reasonable costs of the quote.
4. Before submitting a "Combined ET/OT/CT and Move up/Acting Time Report" (Overtime sheet) to the accounting department, the regular or overtime sheet must contain:
  - Employee's name and signature
  - Department manager's or director's approval signature
  - Project manager's approval signature
  - executive director of Facilities Planning & Management approval signature under restricted funds manager
5. Once step four is completed, the PM or CM submits paper set to the assigned accountant for the account string under Escape Account Structure.

6. The assigned accountant will keep a copy of the sheet in the accounting department. Other departments will get copies as noted below.
  - a. For the B & G department, the assigned accountant will submit the overtime sheet to B & G (inbox located in the Mailroom).
  - b. For the Custodian department, the assigned accountant will scan the overtime sheet and e-mail it to the Custodian department.
  - c. For the Nutritional Services department, the assigned accountant will scan the overtime sheet and e-mail it to Nutritional Services department.

DRAFT

LBU calculation sample worksheet below:



Oakland Unified School District  
Local Business Enterprise Participation  
Monthly Tracking Worksheet

12/16/2021

Project Name:	
Project No:	
General Contractor:	
Pay Application No.	
Pay Application Month/Year:	

Total Bid Dollar Amount:	\$	10,000,000
Total Bid Allowance Amount:	\$	50,000.00
Total LBE Dollar Amount at Bid Time:	\$	250,000
Total LBE % at Bid Time:		2.5%

Previous Cumulative Total LBE Dollar Amount:	\$	50,000
LBE Dollar Amount this Pay Application:	\$	24,000
Current Cumulative Total LBE Dollar Amount:	\$	74,000
Current Cumulative Total LBE %:		0.7%

No.	LBE Type	Contractor/Subcontractor Name	Trade	Amounts this Pay Application					Current Cumulative Local Business Dollar Amount	Remaining LBE Participation (Bid Time vs. Current Cumulative)	Current Cumulative LBE %
				Proposed Local Business Enterprise Dollar Amount At Bid Time	Previous Cumulative Local Business Enterprise Dollar Amount	Local Business Enterprise Dollar Amount (LBE)	Small Local Business Enterprise Dollar Amount (SLBE)	Small Local Resident Business Enterprise Dollar Amount (SLRBE)			
1		General name here	General Contractor	\$ -	\$ -				\$ -	\$ -	0.0%
2	SLBE	Sub contractor 1	Plumbing	\$ 10,000	\$ 10,000		\$ 15,000		\$ 25,000	\$ 25,000	0.3%
3	SLRBE	Sub contractor 2	Electric	\$ 75,000	\$ 15,000			\$ 3,000	\$ 18,000	\$ 57,000	0.2%
4	SLBE	Sub contractor 3	Painting	\$ 25,000	\$ 5,000		\$ 1,000		\$ 6,000	\$ 19,000	0.1%
5	LBE	Sub contractor 4	Paving	\$ 100,000	\$ 20,000	\$ 5,000			\$ 25,000	\$ 75,000	0.3%
6									\$ -	\$ -	0.0%
7									\$ -	\$ -	0.0%
8									\$ -	\$ -	0.0%
9									\$ -	\$ -	0.0%
10									\$ -	\$ -	0.0%
<b>TOTALS</b>				<b>\$ 250,000</b>	<b>\$ 50,000</b>	<b>\$ 5,000</b>	<b>\$ 16,000</b>	<b>\$ 3,000</b>	<b>\$ 74,000</b>	<b>\$ 176,000</b>	<b>0.7%</b>

## Combined ET/OT/CT and Move up/Acting Time Report



### COMBINED ET/OT/DT AND MOVE UP TIME REPORT (Classified and Administrative Support Employees Only)

Date:

_____ Last Name	_____ First Name	_____ MI
_____ Employee ID	_____ Position	_____ Site/Department Name

Justification and/or description of work assigned:  
Please attach additional documents if needed

\_\_\_\_\_  
Supervisor Name

Regular Work Schedule Hours: \_\_\_\_\_ to \_\_\_\_\_

Number of Regularly Scheduled work hours per day \_\_\_\_\_

**PLEASE SELECT ONE:**

Are you an instructional aide or paraprofessional who was asked to supervise students for more than 30 minutes without a teacher in the room?

**SELECT TYPE OF EXTRA WORK:**

**EXTRA TIME** - (Time worked by part-time employees beyond normal authorized work hours. Up to seven and one half (7.5) hours). Paid at normal pay rate.

**PREMIUM PAY** - Half of employee's normal hourly pay

**OVERTIME** - (Time worked by an employee beyond seven and one half (7.5) hours) or a 6th day within a work week. Paid at time and one half.

**DOUBLE TIME** - (Time worked on the 7th consecutive day within a work week or more than 12 hours in one day. Paid at double pay rate.)

**MOVE UP** (Time worked above regular job classification. Paid at 5% of their base salary pay.)

Job Title Assumed \_\_\_\_\_

**ESCAPE Account Structure** (OFFICE USE ONLY)

Please Copy and Paste Budget code from Escape  
**FUND- RESOURCE-YEAR-GOAL-FUNCTION-OBJECT-SITE-MANAGER-PROGRAM-LCAP-OPTIONAL**

From Date/Time	To Time	Hours Worked	Adjusted Hours for Lunch	From Date/Time	To Time	Hours Worked	Adjusted Hours for Lunch	From Date/Time	To Time	Hours Worked	Adjusted Hours for Lunch

COMMENTS:

TOTAL HOURS WORKED:  
 TOTAL ADJUSTED HOURS:  
 TOTAL HOURS TO BE PAID:

**Signatures Required**

\_\_\_\_\_  
 Employee's Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Supervisor

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Custodial Director (if applicable)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Restricted Funds Manager (if applicable)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Payroll

\_\_\_\_\_  
 Date



**COMBINED ET/OT/CT AND MOVE-UP / ACTING TIME REPORT**  
(Classified and Administrative Employees Only)

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Date: \_\_\_\_\_, 20\_\_\_\_  
(Please Print)

Employee ID: \_\_\_\_\_ Position: \_\_\_\_\_ Site: \_\_\_\_\_ Department Name: \_\_\_\_\_

Justification and/or description of work assigned: \_\_\_\_\_ Working Schedule Hours: \_\_\_\_\_ to \_\_\_\_\_

From	To	Hours Worked	Type (Please Check One)			Move-Up/Acting (Title/Job Assumed)	For Payroll Only	ESCAPE Account Structure											
								The number identified on each box is the number of digits needed to have an accurate account structure											
							Rate of Pay	Fund	Resource	Year	Goal	Function	Object	Site	Manager	Program	LCAP	Optional	

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Manager/Director's Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Restricted Funds Manager: \_\_\_\_\_ Date: \_\_\_\_\_  
 Financial Analyst: \_\_\_\_\_ Date: \_\_\_\_\_  
 HR Director: \_\_\_\_\_ Date: \_\_\_\_\_  
 Network Superintendent: \_\_\_\_\_ Date: \_\_\_\_\_  
 Deputy Chief: \_\_\_\_\_ Date: \_\_\_\_\_

Types:  
 ET – EXTRA TIME (time worked by Part-Time employee beyond normal authorized work hours. Up to seven and one half (7.5). Paid at normal pay rate.  
 OT – OVER TIME (time worked by an employee beyond seven and one half (7.5) hours). Paid at time and one half.  
 CT – COMPENSATORY TIME (extra time, over time, or call-back time allowed by unit rules) to be paid in the form of compensatory time off at a later date.  
 MOVE-UP / ACTING (employee working out of regular job classification). Paid at 5% of their current base salary.

## 2.2 | Stop Check Payment & Duplicate Replacement Warrant Check

1. If a check is outstanding for more than two weeks, the project engineer or project manager will e-mail the Facilities Accounting department.
2. The project engineer or project manager needs to verify if the address of the vendor on file is correct.
3. The Facilities Accounting department will contact the county to verify whether the check has been cashed.
4. If the check is still outstanding, the Facilities Accounting department will e-mail the county to make a stop payment, or if it has been cashed. If the check was cashed documentation will be provided.
5. **Accounting will** request Alameda County to re-issue a duplicate warrant.
6. Form is given to the vendor by Accounting through e-mail. (The vendor fills out part two only.)
7. The form is then returned to the Facilities Accounting department by the vendor.

Accounting reviews the form and sends it to Accounts Payable for re-issue.

## 2.3 | Procedure for Initiating Contract

### **Purpose**

The agreement request process provides the workflow and process for creating contracts and agreement requests for the project team.

### **Contract & Agreement Request Process**

The project manager or project engineer creates a contract by using the following steps.

#### **Filling out the Agreement Request & Contract Justification:**

- The PM/CM/PE team will fill in and provide relevant information on the agreement request & contract justification form. They will provide contractor/vendor contact information, select the type of contract, provide the contract amount and duration, provide the scope, and provide details describing how the contractor/vendor was selected.
- While filling in the form, the PM/CM/PE should create the contract in the associated project in Account-Ability and create the contract report.
- After the agreement request & contract justification form and the contract report are created, the PM/CM/PE will provide these documents to the project accountant who will then fill in the budget information and link the contract to the project budget in Account-Ability.
- After this has been performed, the accountant should sign the contract report and return the documents to the PM/CM/PE team.

#### **Routing the Agreement Request & Contract Justification Forms for Approval:**

After the PM, CM, or PE team has received the agreement request & contract justification form and contract report from the project accountant, they route it for approval to the executive director of Facilities Planning & Management and deputy chief of Facilities. The following documents must be provided for a contract or agreement request to be approved:

- Request for signature cover sheet, which describes the documents and what is attached.
- Contract report with signatures from the PM and project accountant.
- Agreement request & contract justification form.
- Proposal for services & cost estimate. (Note that the contingency allowance must be noted on the proposal provided by the contractor/vendor.)
- Hourly rates.
- Local business utilization form or waiver. (See section 2.1 for LBU form)
- Any additional backup documents as needed.

#### **Routing the Agreement Request & Contract Justification Forms to the Contracts Manager:**

After the contract package has been approved by the executive director of Facilities Planning & Management and the deputy chief of Facilities, the PM/CM/PE team will submit the package, along with a transmittal sheet, to the Facilities contracts & bids specialist.

The PM/CM/PE team should save a copy of the contract package on the OUSD Facilities server in the associated project folder.

Upon receiving the contract package, the Facilities contracts & bids specialist will provide the package to OUSD's legal counsel for review, submit the contract to the contractor/vendor for signature and agreement, and submit the package to the Board of Education for review and approval.

See sample forms below.

DRAFT



**OAKLAND UNIFIED SCHOOL DISTRICT**  
**Department of Facilities Planning and Management**  
**AGREEMENT REQUEST FORM**

<b>OBJECT NUMBER</b>

<b>Requested By:</b>	<b>Date Requested:</b>

<b>BUDGET NUMBER</b>

<b>Project Name:</b>	
----------------------	--

<b>FUNDING SOURCE(s)</b>	
--------------------------	--

<b>Project Number:</b>	
------------------------	--

<b>RESOURCE/GOAL</b>	
----------------------	--

<b>VENDOR NUMBER</b>	
----------------------	--

<b>Contractor/Vendor (Name, Address, Phone, Email):</b>

<b>APPROVED:</b>	
Tadashi Nakadegawa, Deputy Chief of Facilities PM	Date
Kenya Chatman, Executive Director of Facilities	Date

Local Business Participation	LOCAL	SMALL	RESIDENT	TOTAL
	0.00	0.00	0.00	0.00%

TYPE OF SERVICE / FORM OF CONTRACT		
<b>A. Construction Contract:</b>		
1	\$60,000 or Less [No Bidding]	<input type="checkbox"/>
2	Over \$60,000 [Informal CUPCCAA Bidding]	<input type="checkbox"/>
3	Over \$60,000 [Formal Bidding]	<input type="checkbox"/>
4	Exception to Bidding: (see attached list of potential exceptions)	<input type="checkbox"/>
<b>B. Consultants/Service Contract:</b>		
1	Construction Manager, Land Surveyor, or Environmental [RFP Required, per Board]	<input type="checkbox"/>
2	Architect or Engineer [RFP Required]	<input type="checkbox"/>
3	Other Professional or Specially Trained Services or Advice [RFP Required, per Board]	<input type="checkbox"/>
4	All Services Other than Above – Over \$96,700 [Competitive Bidding]	<input type="checkbox"/>

5	All Services Other than Above - \$96,700 or Less [No Bidding]	<input type="checkbox"/>
<b>C. Purchase Contract:</b>		
1	\$96,700 or Less [No Bidding]	<input type="checkbox"/>
2	Over \$96,700 [Competitive Bidding]	<input type="checkbox"/>
3	Exception to Bidding: (see attached list of potential exceptions)	<input type="checkbox"/>
<b>D. Maintenance Contract:</b>		
1	\$96,700 or Less [No Bidding]	<input type="checkbox"/>
2	Over \$96,700 [Competitive Bidding]	<input type="checkbox"/>
3	Exception to Bidding: (see attached list of potential exceptions)	<input type="checkbox"/>
<b>E. Amendments:</b>		
1	Change Order to Construction Contract	<input type="checkbox"/>
2	Amendment to Other Contract	<input type="checkbox"/>

For Contracts and Amendments, on the following page provide the requested information.

<b>CONTRACT TERM</b>	
<b>Start Date / End Date:</b>	
<b>TOTAL COST:</b>	



**CONTRACT JUSTIFICATION FORM**  
**This Form Shall Be Submitted to the Board Office With Every**  
**Agenda Contract.**

**Legislative File ID No.** [Redacted]  
**Department:** Facilities Planning & Management  
**Vendor Name:** [Redacted]  
**Project Name:** [Redacted] **Project No.:** [Redacted]  
**Contract Term:** Intended Start: [Redacted] Intended End: [Redacted]  
**Total Cost Over Contract Term:** \$ [Redacted]  
**Approved by:** Tadashi Nakadegawa [Redacted]

**Is Vendor a local Oakland Business or has it met the requirements of the**

**Local Business Policy?**  Yes (No if Unchecked)

**How was this contractor or vendor selected?**

[Redacted]

**Summarize the services or supplies this contractor or vendor will be providing.**

[Redacted]

**Was this contract competitively bid?**  Check box for "Yes" (If "No," leave box unchecked)

If "No," please answer the following questions:

1) How did you determine the price is competitive? *[State facts that explain in detail the action taken by District staff to ascertain that the contract's price is reasonable.]*

[Redacted]

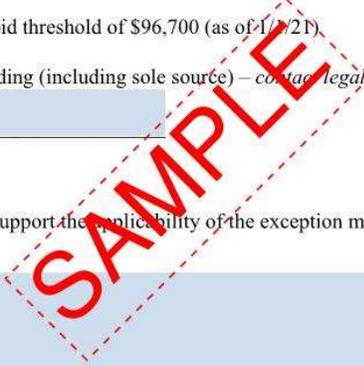
- Electronic equipment – competitive negotiation (Public Contract Code §20118.2) – *contact legal counsel to discuss if applicable*
- CMAS contract [may only include “incidental work or service”] (Public Contract Code §§10101(a) and 10298(a)) – *contact legal counsel to discuss if applicable*
- Piggyback contract for purchase of personal property (Public Contract Code §20118) – *contact legal counsel to discuss if applicable*
- Supplies for emergency construction contract (Public Contract Code §§22035 and 22050) – *contact legal counsel to discuss if applicable*
- No advantage to bidding (including sole source) – *contact legal counsel to discuss if applicable*
- Other:

Maintenance Contract:

- Price is at or under bid threshold of \$96,700 (as of 1/1/21).
- No advantage to bidding (including sole source) – *contact legal counsel to discuss*
- Other:

3) Explain in detail the facts that support the applicability of the exception marked above:

- 



2) Please check the competitive bidding exception relied upon:

Construction Contract:

- Price is at or under UPCCAA threshold of \$60,000 (as of 1/1/19)
- CMAS contract [may only include “incidental work or service”] (Public Contract Code §§10101(a) and 10298(a)) – *contact legal counsel to discuss if applicable*
- Emergency contract (Public Contract Code §§22035 and 22050) – *contact legal counsel to discuss if applicable*
- No advantage to bidding – *contact legal counsel to discuss if applicable*
- Sole source contractor – *contact legal counsel to discuss if applicable*
- Completion contract – *contact legal counsel to discuss if applicable*
- Lease-leaseback contract RFP process – *contact legal counsel to discuss if applicable*
- Design-build contract RFP process – *contact legal counsel to discuss if applicable*
- Energy service contract – *contact legal counsel to discuss if applicable*
- Other:  *contact legal counsel to discuss if applicable*

Consultant Contract:

- Construction project manager, land surveyor, or environmental services – selected based on demonstrated competence and professional qualifications (Government Code §4526)
- Architect or engineer – use of a fair, competitive RFP selection process (Government Code §§4529.10 et seq.)
- Architect or engineer when state funds being used – use of competitive process consistent with Government Code §§4526-4528 (Education Code §17070.50)
- Other professional or specially trained services or advice – no bidding or RFP required (Public Contract Code §20111(d) and Government Code §53060) – *contact legal counsel to discuss if applicable*
- For services other than above, the cost of services is \$96,700 or less (as of 1/1/21)
- No advantage to bidding (including sole source) – *contact legal counsel to discuss if applicable*

Purchasing Contract:

- Price is at or under bid threshold of \$96,700 (as of 1/1/21)
- Certain instructional materials (Public Contract Code §20118.3)
- Data processing systems and supporting software – choose one of three lowest bidders (Public Contract Code §20118.1)

-2-

{SR540259}

## 2.4 | Signature Procedure

1. The request for signature form is used as a cover sheet for all documents that require a signature from either the executive director of Facilities Planning & Management and/or the deputy chief of Facilities. This form is a Word document located on the P: drive at P:\STANDARD FORMS\Request for Signature Template.
2. The project manager completes the request for signature form and delivers it to the executive director of Facilities Planning & Management's inbox with all corresponding documents. The executive director of Facilities Planning & Management delivers the signed document to the deputy chief of Facilities, if applicable.
3. The deputy chief of Facilities returns the signed document to the PM/CM/PE's inbox upon completion.
4. The project manager forwards the signed documents to the appropriate destination and then scans the file(s) for archiving on the OUSD server within the associated project folder.
5. The following documents must be signed by the executive director of Facilities Planning & Management and deputy chief of Facilities:
  - Agreement request forms
  - New project authorization forms
  - Budget increase request forms
  - Allowance expenditure directives
  - Preliminary change orders
  - Change orders
  - Certificates of substantial completion
  - Notices of completion (only deputy chief of Facilities)
  - DSA forms
  - Any other documents requiring OUSD signature (e.g., PG&E, EBMUD, or City of Oakland).

**See sample forms below:**

**Oakland Unified School District  
Department of Facilities Planning & Management**

**Request for Signature**

**To:** Tadashi Nakadegawa, Deputy Chief of Facilities  
Kenya Chatman, Executive Director of Facilities

**From:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Project Name:** \_\_\_\_\_

**Project Number:** # \_\_\_\_\_

**Type of Document:**

**Reason for Request:**

**Project Manager Recommendation:**     Please approve    

**ATTACHMENT:**

1.



## 2.5 | RFQ/P for Architectural Services

1. In coordination with the executive director of Facilities Planning & Management, the Facilities procurement manager and project manager shall determine the procurement track (i.e., informal or formal solicitation).
  - For projects under \$5 million and limited in scope, the project manager may directly solicit proposals from the District's pre-qualified pool of architects. The project manager must obtain at least three competitive proposals before making a recommendation on a finalist.
  - For projects \$5 Million and over and/or complex in scope, the project manager and program manager shall coordinate with the Facilities contract & bids specialist to develop a formal RFQ/P to be publicly advertised in a local newspaper and placed on the District's website.
2. The project manager, program manager, and the executive director of Facilities Planning & Management shall schedule a pre-proposal meeting with all architectural firms interested in the project for either solicitation track.
3. The project manager, program manager, and executive director of Facilities Planning & Management will oversee the RFQ/P process, addressing any questions via an addendum to the document.
4. Vendor proposals to the RFQ/P shall be submitted to the Facilities department and logged in by the Facilities contract & bids specialist.
5. The Facilities contract & bids specialist will distribute the proposals to the review team. The review team shall include a representative from the school project site as determined by the school's Principal. The Facilities contract & bids specialist will also forward the proposals to the District's local business utilization consultant to review and determine the proposer's LBU eligibility.
6. The executive director of Facilities Planning & Management, project manager, and program manager will develop a shortlist of approved candidates and conduct interviews with each firm. One of the interview team's members shall be a representative from the school project site, if necessary. The Facilities contract & bid specialist will prepare and issue letters to the RFQ/P respondents notifying them of the interview date and subsequently the notice of intent to award. Rejection letters will be sent to other proposers.
7. Once the interviews are complete and the RFQ/P interview team selects the architectural firm that best suits the project's needs, the project manager, program manager, and executive director of Facilities Planning & Management shall work with the selected architectural firm to negotiate the fee that will be charged for the project's design services, which will be based on the understanding of the scope as defined in the RFP/Q. An additional 10% of the agreed fee must be included in the architect's proposal as a design contingency line item. Additional negotiated contingencies should be shown as applicable.
8. Review section 2.3 for procedures related to initiating a contract with the architectural firm. The agreement must be executed by the Board of Education.

## 2.6 | RFQ/P for Other Professional Services

### **RFQ/P for Other Professional Services Process – Selecting from Pre-Qualified Pool:**

1. *“Other Professional Services”* shall include, but is not limited to, the following:
  - Geotechnical and geohazard consultant
  - Hazardous materials abatement consultant
  - DSA-certified project inspector
  - Environmental site assessment consultant
  - Site survey services
  - CEQA
  - Special Inspections
2. The project manager will, if applicable, select firms for the required professional services listed above and request proposals from the District's pre-qualified pool. The project manager must obtain three competitive proposals prior to making a recommendation under this informal solicitation process.
3. The PM will review the proposals and negotiate the fees for the professional services.
4. The PM will develop the agreement. Review section 2.3 for procedures related to initiating a contract with the specialty professional services firm. The agreement must be executed by the Board of Education.
5. The PM can immediately engage their services after BOE ratification.

## 2.7 | Budget and Cost Management

1. The project manager is responsible for managing each project's approved scope, budget, and schedule. When owner-approved scope changes, conditions change, architectural document corrections, or any other reason that causes the project manager to determine that the cost of the project may exceed the budget, they shall promptly notify the executive director of Facilities Planning & Management, deputy chief of Facilities, and program manager. The project manager's primary goal shall be to recommend options for value engineering the project to maintain budget. When a VE solution is not the best option, the project manager may request additional funds.
2. The project manager is required to know the status of the total project budget at all times. This understanding must include knowledge of all soft and hard costs associated with the project.
3. The project manager is responsible for properly tracking all contracts, invoices, and pay applications in Account-Ability and the Project Files database (G:PDATA/Project Files).
4. Each project manager is required to prepare and actively update a *Project Cost Worksheet* for each of their projects. This worksheet is independent of Account-Ability and is used to track all the costs and budgets that apply to the project. A template of this worksheet can be found on the G: drive (G\PDATA\Pay App Log).
5. The project manager's goal is to identify budget problems early enough for the District to have choices that allow for adjustments to be made so the overall budget is not impacted.

## 2.8 | Budget Increase and Budget Decrease

Once agreed that a budget increase or decrease is needed, the PM/CM/PE must complete the following procedures.

1. The project manager prepares a budget increase or budget transfer form, including the following information:
  - a. Project name
  - b. Project site
  - c. Project number
  - d. Project type
  - e. Funding source
  - f. Project manager
  - g. Reason for the budget increase / decrease
  - h. Description of the change (e.g., construction, architect, testing, inspection, etc.)
  - i. Amount and description for each change
  - j. Total amount of the change(s)
  - k. Original budget amount
  - l. Budget change amount (the total amount to be increased/decreased)
  - m. Revised budget amount (line L and line M on the form)
2. The project manager submits the Budget Increase or budget transfer form to accounting by e-mail:
  - a. The e-mail should contain the following:
    - In the subject line, include the budget increase (or budget transfer) title, project name, and project number.
    - The budget increase or transfer form as an attachment.
    - Attachment of all backup documentation justifying the reason for the change.
  - b. Note: If budget increase is from another project or a line item within the spending plan, then the budget increase form must be accompanied by a budget decrease form.
3. Accounting prints the provided form(s) and provides funding information to the program accounting manager.
4. The program accounting manager signs the provided form(s).
5. Accounting returns the signed form(s) to the project manager.
6. The project manager submits the forms and backup to the executive director of Facilities Planning & Management and deputy chief of Facilities for signatures.
7. The project manager saves all signed documents to the G: drive, Project Files, with date and description.
8. The project manager provides approved copy of the form to Accounting.

9. Accounting notifies project manager when a project budget change has occurred.

**Compensable and Non-Compensable Contract Time Extension:**

The PM/CM/PE must complete the following procedures for compensable and non-compensable contract time extensions.

1. The project manager prepares contract time extension form, including the following information:
  - a. Date stamped from mail room
  - b. Project name
  - c. Project site
  - d. Project number
  - e. Project type
  - f. Funding source
  - g. Project manager
  - h. Reason for the time extension(s)
  - i. Description of the extension(s) (e.g., construction, architect, testing, inspection, etc.)
  - j. Time extension for each description
  - k. Total days to be extended
  - l. Original date of contract
  - m. Total time extension in days to be added
  - n. Revised contract completion date
2. The project manager submits the contract extension to accounting by e-mail:
  - a. The e-mail should contain the following information:
    - Subject line: Extension date, project name, and project number
    - Extension date form as an attachment
    - Attachment of all backup documentation justifying the reason(s) for the date extension
3. Accounting prints the “date extension form” and provides funding information to the PM/CM/PE.
4. The program accounting manager signs the extension date form.
5. Accounting returns the extension date form to the project manager.
6. The project manager submits a budget increase form to the executive director of Facilities Planning & Management and deputy chief of Facilities for signatures.
7. The project manager saves all signed documents to the G: drive, Project Files.

8. The project manager provides the approved copy of the extension date form to Accounting.

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**OAKLAND UNIFIED SCHOOL DISTRICT  
FACILITIES PLANNING AND MANAGEMENT DEVELOPMENT  
PROJECT BUDGET TRANSFER AUTHORIZATION FORM**

FORM INITIATION DATE: \_\_\_\_\_  
 BOND MEASURE OR RESOURCE: \_\_\_\_\_  
 PROJECT MANAGER: \_\_\_\_\_

REASON FOR BUDGET DECREASE:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

REASON FOR BUDGET INCREASE:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

	<u>PROJECT# /SITE</u>	<u>DESCRIPTION</u>	<u>ORIGINAL BUDGET</u>	<u>TOTAL PRIOR CHANGE(S) AMT: Inc(+)/Dec(-)</u>	<u>CURRENT CHANGE AMT: Inc(+)/Dec(-)</u>	<u>NEW PROJECT BALANCE</u>
<b>FROM (Decrease)</b>						\$ -
						\$ -
						\$ -
						\$ -
<b>Total FROM Amount</b>					\$ -	\$ -
<b>TO (Increase)</b>						\$ -
						\$ -
						\$ -
						\$ -
<b>Total TO Amount</b>					\$ -	\$ -

\$0.00

NOTE: \_\_\_\_\_

\_\_\_\_\_

**AUTHORIZED SIGNATURES:**

Program Accounting Manager \_\_\_\_\_ DATE \_\_\_\_\_

Director of Facilities \_\_\_\_\_ DATE \_\_\_\_\_

Deputy Chief \_\_\_\_\_ DATE \_\_\_\_\_

Contract Administrator \_\_\_\_\_ DATE \_\_\_\_\_



3.0  
**DESIGN**

### 3.1 | Design Phase Management Process:

1. Once the architect's contract has been approved by the Board of Education, the project manager shall set up a meeting with the program manager, architect, site principal, and the executive director of Facilities Planning & Management to kick off and refine the scope of the project. At this meeting, the following items should be discussed:
  - a. Project scope
  - b. Project budget
  - c. Project schedule
  - d. Key team members
  - e. Project protocols/procedures
2. The project manager will also need to execute contracts with and obtain reports from the following consultants (if applicable):
  - a. A geotechnical consultant
  - b. A surveying consultant
  - c. Underground utility location consultant
  - d. A commissioning agent (to be provided to the Architect upon execution of the architect's contract)
  - e. SWPPP, hazmat, elevator, and/or FA/IA consultants
3. The project manager should send the architect copies of the following updated OUSD design standards:
  - a. Materials standards
  - b. Door hardware design standards
  - c. Elevator design standards
  - d. Fire alarm design standards
  - e. Intrusion alarm design standards
  - f. OUSD technology services standards

Current versions of these standards can be found on the G: drive under the folder [G:\Design Guidelines and Material Standards.](#)

4. The project manager shall set up a meeting with staff from the various Buildings & Grounds, Facilities, and Custodian departments to discuss any specific needs for the site that are to be addressed with the Architect, within reason.

The departments include the following:

- a. Carpenters
- b. Custodial
- c. Electrical
- d. Fire alarm and intrusion alarm
- e. Heating
- f. Intercom/phone/clock
- g. Landscaping
- h. Locksmith
- i. Plumbing

- j. Roofing
- k. Sustainability

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**Site Survey/Geotech (if applicable)**

	Date	Reviewed By
Site Survey Completed*		
Geotechnical Survey Completed		
Hazardous Soil Testing Completed		
Abatement/Hazardous Demolition Testing Report Completed		

**Site Utilities/Misc. (if applicable)**

	Date	Reviewed By
EBMUD (New Fire Sprinkler, Domestic Water, Irrigation)		
PG&E New Electrical Service		
PG&E New Natural Gas Service		
Storm Water Prevention Plan		
AT&T/SONIC		

**Schedule/Phasing Review**

	Date	Reviewed By
Schematic Design Schedule/ Duration		
Design Development Schedule/ Duration		
Construction Document Schedule/Duration		
Phasing Plan Review		

(Continued on next page)

**Scoping/Architectural Review**

	Date	Reviewed By
Original Scoping Meeting		
Owner Project Requirements (OPR) Reviewed		
Basis of Design (BOD) Reviewed		
CHPS Meeting with Design Team		
Review of Current OUSD Design Standards		
Review of Current OUSD Color Schemes		

**Elevator/Wheelchair Lift (if applicable)**

	Date	Reviewed By
Elevator Specification Review		
Wheelchair Lift Specification Review		

**Mechanical Systems**

	Date	Reviewed By
Mechanical Pre-Design Meeting		
Mechanical Initial Review of Drawings		
Mechanical Controls System Review		
Mechanical Final Review of Drawings		

*(Continued on next page)*

**Electrical Systems**

	Date	Reviewed By
Electrical Pre-Design Meeting		
Electrical Initial Review of Drawings		
Electrical Final Review of Drawings		

**Fire Alarm & Intrusion Alarm Systems**

	Date	Reviewed By
Fire Alarm/Intrusion Alarm Pre-Design Meeting		
Initial Review of Fire/Intrusion Alarm Drawings		
Final Review of Fire/Intrusion Alarm Drawings		

**Intercom/Clock/VOIP Systems**

	Date	Reviewed By
Intercom/Clock/VOIP Pre-Design Meeting		
Intercom/Clock/VOIP Initial Review of Drawings		
Intercom/Clock/VOIP Final Review of Drawings		

**IT/Data/Security Camera Systems**

	Date	Reviewed By
IT/Data/Security Camera Pre-Design Meeting		
IT/Data/Security Camera Initial Review of Drawings		
IT/Data/Security Camera Final Review of Drawings		

*(Continued on next page)*

**Commissioning (if applicable)**

	Date	Reviewed By
Initial Commissioning Meeting with Design Team		
Commissioning Agent Review of OPR/BOD		
Commissioning Agent Initial Review of Design Documents		
Commissioning Agent Final Review of Design Documents		

**Constructability Review**

	Date	Reviewed By
Initial Constructability Review		
Design Team Response to Constructability Review		
Backcheck of Design Team Responses to Constructability Review		

### 3.3 | AE Deliverable Matrix

[LINK](#)

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### 3.4 | Pre-bid Checklist

1. The project manager should complete the "Request for Advertisement" form and submit it to the Facilities contracts and bids specialist.
  - a. Publication of notice pursuant to this section shall be once a week for two successive weeks. Two publications in a newspaper published at least weekly with at least five days between the respective publication dates, not counting such publication dates, are sufficient. The period of notice commences upon the first day of publication and terminates at the end of the fourteenth day, including therein the first day.
  - b. Prior to advertisement, the project manager and Local Business Compliance officer determine whether there is an LBU waiver for the project. If it is determined after advertisement that there is a LBU waiver, it must be submitted as an addendum to notify the potential bidders.
2. The project manager shall assist the Facilities contracts and bids specialist with assembly of front ends/specifications. The PM/CM/PE needs to give the Facilities contracts and bids specialist at least (1) week to prepare the front ends/specifications, and upload them to the East Bay Blue Print.
  - a. The PM shall send copies of the following documents to the Facilities contracts and bids specialist:
    - i. (DSA) approved plans and specifications
    - ii. Hazardous materials survey and specifications
    - iii. Geotechnical report and geohazards report
3. The Facilities contracts and bids specialist shall initiate 1st and 2nd advertisements. (See section 4.1 for more information.)
4. The PM/CM/PE shall schedule a pre-bid walk with interested bidders. They shall also coordinate with the Local Business Compliance officer, Labor Compliance officer, and project manager.
5. The PM/CM/PE shall reach out to prospective bidders prior to the pre-bid walk to encourage attendance and bidding.
6. The PM will conduct the pre-bid walk. (See section 4.4.) After the walk, the PM shall send the bidder sign-in sheet to the Facilities contracts and bids specialist.
7. If addendums are required, they need to be submitted by the PM/CM/PE to the Facilities contracts and bids specialist so they can be sent to prospective bidders and East Bay Blue Print.
  - a. All addendums and responses to pre-bid RFIs are due 72 hours prior to bid opening.
8. The PM/CM/PE shall reach out to prospective bidders prior to bids being due to encourage their bidding on the project.

Bidders who desire to submit a bid protest must submit their protest in writing within 48 hours after receiving bids to the PM/CM/PE.

## 3.5 | Cost Estimating and Reconciliation Process

### Purpose

The purpose of this process, specifically the cost reconciliation worksheet, is to provide the design team with a standard tool to compare, analyze, and reconcile two independent cost estimates. Each phase of design, schematic design, design development, and construction documents, must receive cost estimates.

This worksheet is a tool to compare two independent estimates in the 33-divisions format for a site and building. For projects involving multiple buildings, the worksheet provides tabs to create individual building and site work worksheets to allow a building-by-building comparison in the 33-divisions format.

### Cost Estimating Reconciliation Process

The A/E firm and the District's PM/CM/PE estimator must follow the 33 divisions CSI format for site and building.

### Cost Estimating Kick-off Meeting

The District's PM/CM/PE will convene and lead the cost estimating kick-off meeting with the A/E and PM/CM/PE in attendance, along with their estimators. This meeting will provide a presentation of the project and general information about the cost estimating process, the preferred method of grouping buildings, the phasing and schedule of the project, and other relevant information. The cost estimating period typically begins on this date.

### Cost Estimating Period

In general, the estimating and reconciliation process should take approximately three weeks, depending on the complexity of the project. The process must abide by the following timelines:

- Initial Estimate: 2 weeks
- Review of Estimate: 2 – 3 business days
- Reconciliation: 2 – 3 business days
- Final Reconciled Cost: 1 business day

### Reconciliation Process Overview

After completing the initial estimate, the AE and PM/CM/PE are responsible for providing the District Program Manager with their cost estimate. Once the PM/CM/PE has performed an 'intake' of the estimates and deemed them complete, the PM will share them with all parties, including the other estimator(s).

The PM/CM/PE will perform a comprehensive assessment of each estimate in preparation for the reconciliation meeting, using the standard Cost Reconciliation Worksheet. Simultaneously, the A/E's cost estimator and the District consultant's cost estimator will perform an independent peer review of the estimate received before the reconciliation meeting. This pre-review must occur so that valuable time is not lost at the cost reconciliation meeting. Significant discrepancies should be noted in each party's independent reconciliation worksheet. Up to three days is allotted for this step.

## **Reconciliation Meeting**

A reconciliation meeting will be scheduled approximately three weeks after the kick-off meeting. Typically, this will be a two- to three-hour meeting, depending on the number of cost discrepancies and size and complexity of the project. The team will review each division's costs, addressing all parties' significant differences (5%). A general agreement must occur on aligning the differences during the meeting. (e.g., adjusting unit cost, quantity, or unit type).

The PM/CM/PE's cost reconciliation worksheet serves as the agenda for the reconciliation process, starting with the site costs and progressing through all divisions. A consensus must be reached for each cost division by line item. The agreed upon amount should be noted in the last column of the reconciliation worksheet. Typically, one of the estimated costs (or a hybrid of the two) will be agreed upon. The agreed upon number is recorded as the basis for the reconciled number. As a general rule, a conservative approach should be taken in the reconciliation process. For example, when two cost estimators have generally reconciled their numbers but are off by some degree (2.5%), they should take a more conservative or higher number.

In an instance where one or both cost estimators cannot reconcile an individual cost, the estimators shall return to their home offices and produce a revised result within 48 hours of the reconciliation meeting.

## **Revised Estimate**

Within three days after the reconciliation meeting, both estimators will submit their revised cost estimate based upon the discussions and findings of the cost reconciliation meeting. This revised estimate should capture changes in quantities, unit costs, or agreed upon modifications. This exercise aims to capture the findings of the cost reconciliation meeting and more closely align the two estimates. Typically, the "gap" between the two cost estimates will be substantially reduced.

## **Final Reconciliation**

The revised cost estimates will be delivered to the District and a final reconciled number will be determined by the District's PM and PM/CM/PE. Upon receiving the final estimates, the PM/CM/PE will create a new cost reconciliation worksheet using the revised estimates to identify any significant discrepancies. The District PM and the PM/CM/PE will review both numbers, back-check the inclusion of items discussed at the reconciliation meeting and arrive at the "agreed upon" reconciled number. If some items are still unresolved, it may be necessary to contact the estimators again to clarify specific item(s).

The PM/CM will complete the "Cost Estimate Project Reconciliation Summary" cover page by recording the initial and revised values of the cost estimates and the "agreed upon" reconciled number, as determined by the District PM and PM/CM/PE. In instances where the established budget is exceeded, this cover page will list potential value engineering items and/or alternates (at the schematic design phase) or selected value engineering items and/or alternates (at the design development and construction documents phases) to address the overrun.

The PM/CM/PE will upload estimates, reconciliation worksheets, and project charter to a shared project

folder as follows:

- The PM/CM/PE shall place the two final SD estimates, the final SD reconciliation worksheet, and the SD project charter on the shared project folder under the appropriate folder.
- For both the DD and CD phases, the CMs shall place the two final estimates, the final reconciliation worksheet, and the project charters on the shared project folder.

### Post-Reconciliation Action Items by Phase

#### **Schematic Design Phase**

- The PM will lead the cost reconciliation effort.
- Budget under/overrun
  - If the final reconciled amount is under budget, no further work is required.
  - If there is a cost overrun, the District and its consultants will identify potential value engineering and alternates with associated cost savings to rectify to the budget. These items will be treated as possible items to be incorporated into the documents in the next phase.
  - The PM will present recommendations on potential alternates and VE items to the Bond Leadership Team for approval.
  - The PM will provide an SD “Design Approval Notice to Proceed”, copying the Bond Leadership Team, to the AE firms, which will capture the estimating information, including the cost under/overrun and approved potential VE items or alternates identified. The project charter shall be attached as part of the record.

#### **Design Development Phase**

- The construction manager will lead the cost reconciliation effort.
- Budget under/overrun
  - If the final reconciled amount is under the budget, no further work is required.
  - If there still is a cost overrun, the District and its consultants will assess the level of overrun. Items identified as potential VE or alternate items developed at the SD phase will be incorporated into the documents as needed. Additional alternate or VE decisions may be necessary to reconcile the budget.
  - The PM will present the recommendations on alternates and VE items to the Bond Leadership Team for approval.
  - The PM will provide a DD “Design Approval Notice to Proceed”, copying the Bond Leadership Team, to the AE firms. The letter will capture the estimating information, including the cost under/overrun and approved potential VE items or alternates identified. The project charter shall be attached as part of the record.

#### **Construction Documents Phase**

- The construction manager will lead the cost reconciliation effort.
- Budget under/overrun

- If the final reconciled amount is under the budget, no further work is required.
- If there still is a cost overrun, the District and its consultants will assess the level of overrun. Items identified as potential VE or alternate items, developed at the SD phase, will be incorporated into the documents as needed. Additional alternate or VE decisions may be necessary to reconcile the project budget.
- Recommendations on how alternates are identified on the bid form will be submitted to the deputy chief of Facilities for approval.
- The PM will provide a CD “Design Approval Notice to Proceed”, copying the Bond Leadership Team, to the AE firms. The letter will capture the estimating information, including the cost under/overrun and approved potential VE items or alternates identified. The project charter shall be attached as part of the record.

**See sample templates on the following pages.**

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## DESIGN APPROVAL TO PROCEED

**TO:** SAMPLE ARCHITECT

**FROM:** Facilities Department, OUSD

**DATE:** August 11, 2020

**RE:** Approval to Proceed into Design Development for Alphabet Project, Project #

### PURPOSE

On August 11, 2020 the OUSD Bond Team approved SAMPLE ARCHITECT to proceed into the Design Development Phase of your contract.

This notice is provided with a mutual agreement to maintain a design approval to proceed was necessary before 8/11/2020. It is understood that the project estimated at \$68.89 million. It is understood that approximately \$6 million has been identified as value engineering items, see attached, bringing the project to approximately \$62.89 million. The bid day construction budget was increased to a maximum of \$5 million for the project. This maximum budget is inclusive of the 10% Construction Cost Contingency budget identified in the Agreement sections 2.3.3, 2.4.3, and 2.5.3.

The District and SAMPLE ARCHITECT will engage in negotiating a revised design fee which will also include FF&E design and construction schedule. The approved design schedule is attached.

The main point of contact will be Gray Stone, the Construction Manager.

Thank you for your team's work. It has been greatly appreciated.

Sincerely,

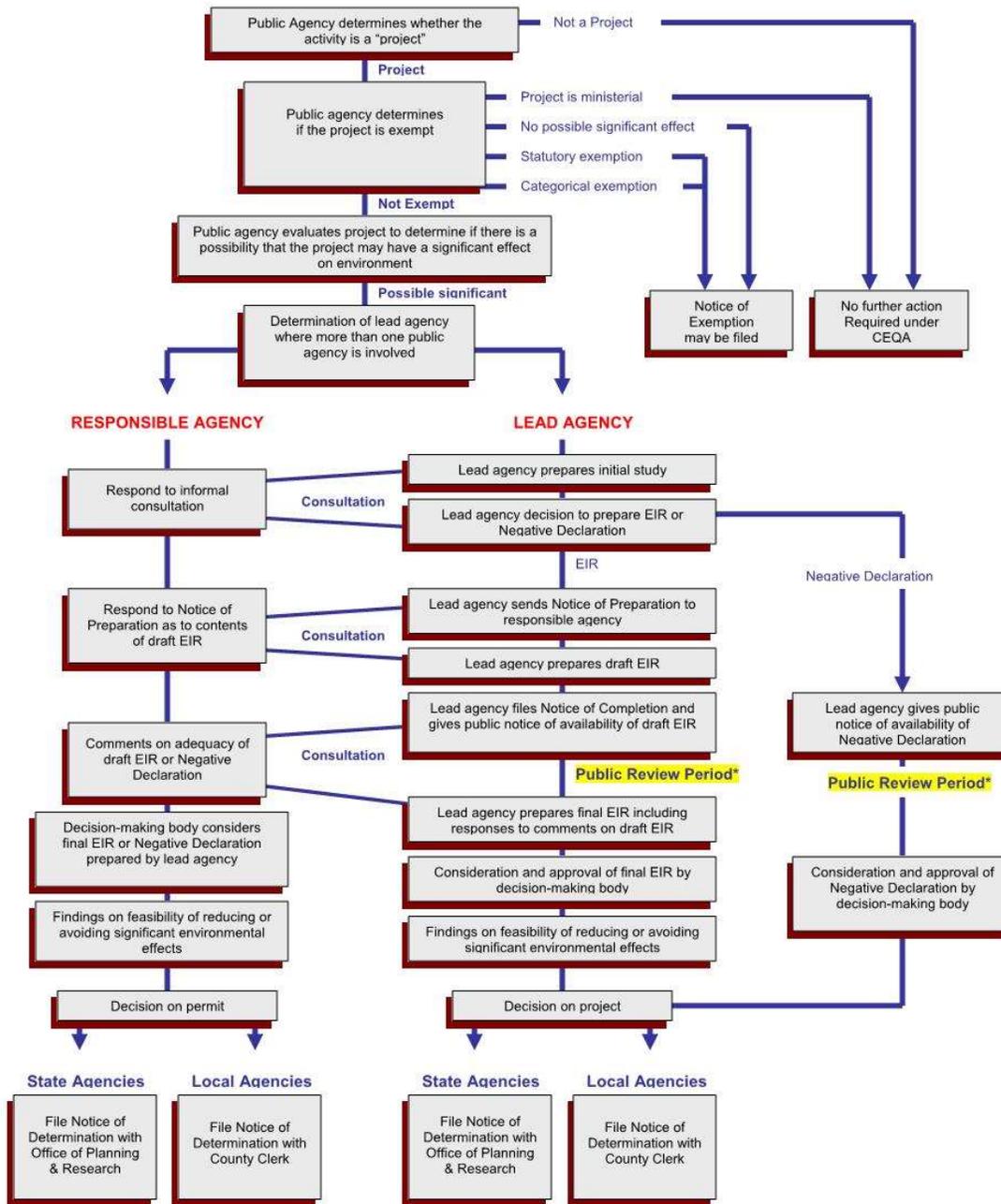
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Deputy Chief, Facilities Planning & Management

Ty S. Taylor, Program Manager  
Nicole Wells, Project Manager

### 3.6 | CEQA Process

## CEQA Process Flow Chart



Source: California Environmental Resources Evaluation System, [http://ceres.ca.gov/topic/env\\_law/ceqa/flowchart/index.html](http://ceres.ca.gov/topic/env_law/ceqa/flowchart/index.html)  
 \* The public review and comment period shall not be less than 30 days and nor should it be longer than 60 days, per the CEQA Guidelines at [http://ceres.ca.gov/topic/env\\_law/ceqa/guidelines/](http://ceres.ca.gov/topic/env_law/ceqa/guidelines/)

California Environmental Quality Act. The California Environmental Quality Act (CEQA) is a California statute passed in 1970,[1] shortly after the United States federal government passed the National Environmental Policy Act (NEPA), to institute a statewide policy of environmental protection. CEQA does not directly regulate land uses, but instead requires state and local agencies within California to follow a protocol of analysis and public disclosure of environmental impacts of proposed projects and adopt all feasible measures to mitigate those impacts.[2] CEQA makes environmental protection a mandatory part of every California state and local agency's decision making process. It has also become the basis for numerous lawsuits concerning public and private projects.

The following information is provided by the Governor's Office of Planning and Research:

### **What is CEQA?**

The California Environmental Quality Act (CEQA) requires government agencies to consider the environmental consequences of their actions before approving plans and policies or committing to a course of action on a project.

### **What is the purpose CEQA?**

This process is intended to: (1) inform government decisionmakers and the public about the potential environmental effects of proposed activities; (2) identify the ways that environmental damage can be avoided or significantly reduced; (3) prevent significant, avoidable environmental damage by requiring changes in projects, either by the adoption of alternatives or imposition of mitigation measures; and (4) disclose to the public why a project was approved if that project has significant environmental impacts that cannot be mitigated to a less than significant level.

### **What is a "Project"?**

A "project" is defined as a "whole action" subject to a public agency's discretionary funding or approval that has the potential to either (1) cause a direct physical change in the environment or (2) cause a reasonably foreseeable indirect physical change in the environment. "Projects" include discretionary activity by a public agency, a private activity that receives any public funding, or activities that involve the public agency's issuance of a discretionary approval and is not statutorily or categorically exempt from CEQA. (Pub. Res. Code § 21065.)

### **The CEQA Process**

If an agency determines that a proposed activity is a project under CEQA, it will usually take the following three steps:

1. Determine whether the project falls under a statutory or categorical exemption from CEQA;
2. If the project is not exempt, prepare an initial study to determine whether the project might result in significant environmental effects; and
3. Prepare a negative declaration, mitigated negative declaration, or EIR, depending on the initial study

### **Step 1: Do Any Exemptions Apply?**

There are two types of CEQA exemptions:

1. Statutory exemptions
2. Categorical exemptions

### **Statutory Exemptions**

Statutory exemptions are created by the Legislature. A project that falls within a statutory exemption generally is not subject to CEQA even if it has the potential to significantly affect the environment.

### **Categorical Exemptions**

The categorical exemptions are created through the regulatory process and are found in CEQA Guidelines §§ 15300-15333. A categorical exemption generally will not apply if (1) there is a reasonable possibility of a significant effect on the environment due to unusual circumstances; (2) significant cumulative impacts from projects of the same type will result; or (3) the project will have impacts on a uniquely sensitive environment. (Guidelines § 15300.2.) For other exceptions, see Guidelines § 15300.2.

### **Notice of Exemptions (NOE)**

A NOE contains several elements: a brief project description; the location of a project; a finding that the project is exempt from CEQA, including a citation to the appropriate exemption; and a brief statement of the reasons to support the finding that the project is exempt. (Guidelines § 15062(a).)

If a NOE is filed after project approval, it will trigger a 35-day statute of limitations for challenging the agency's decision that the project is exempt from CEQA. (Pub. Res. Code § 21167(d); Guidelines § 15062(d).) If the NOE is not filed, the time period for challenging the action under CEQA is normally 180 days following the agency's approval. (Pub. Res. Code § 21167(d); Guidelines § 15062(d).)

### **Step 2: Initial Study**

If the project does not fall under an exemption, the public agency usually undertakes an "initial study." An initial study is a preliminary analysis prepared by the lead agency (usually the city or the county having primary jurisdiction over the project, but may also be state agencies) to determine whether an environmental impact report (EIR) or negative declaration (ND) must be prepared. (Guidelines §§ 15063, 15365; Pub. Res. Code §§ 21080.1, 21080.3.)

The purpose of the initial study is to determine whether there may be a significant environmental impact. (Pub. Res. Code § 21080(c); Guidelines §§ 15063–15065.)

### **Step 3: Appropriate Level of Review**

Depending on the Initial Study, a Negative Declaration, Mitigated Negative Declaration, or Environmental Impact Report may be required.

### **Negative Declaration**

If the initial study concludes that the project will not cause a significant effect on the environment, the agency can prepare a negative declaration. (Pub. Res. Code § 21080(c); Guidelines § 15070 et seq. (negative declaration process).) A negative declaration is a written statement that an EIR is not required because a project will not have a significant adverse impact on the environment. (Pub. Res. Code §§ 21064, 21080(c).)

### **Mitigated Negative Declaration**

An agency may attach conditions to a negative declaration for the purpose of mitigating potential

environmental effects. This is referred to as a “mitigated negative declaration.” (Guidelines § 15070(b); Pub. Res. Code § 21064.5.) A mitigated negative declaration states that revisions in the project made or agreed to by the applicant would avoid the potentially significant adverse impacts, and that there is no substantial evidence that the revised project will have a significant effect on the environment. (Pub. Res. Code § 21064.5; Guidelines § 15070(b) (2).)

### **Environmental impact Report (EIR)**

If the agency determines that the project may have a significant effect on the environment, an EIR must be prepared. (Pub. Res. Code §§ 21002.1, 21061, 21080, 21080.1 et seq.; Guidelines §§ 15080–15081.5.)

### **Scoping**

The first step in preparing an EIR is to determine the scope of the EIR in consultation with agencies, the public, and the applicant. (Guidelines §§ 15082, 15083.)

### **Draft EIR**

Following the scoping process, either the agency must prepare a draft EIR or the applicant’s consultant can prepare the CEQA documents, as long as the agency independently reviews, evaluates, and exercises judgment over the document and the issues it raises and addresses. The draft EIR must be released for public comment for at least 30 days but no more than 60 days, unless there are unusual circumstances. (Guidelines § 15105.)

### **An EIR must contain:**

- A project description;
- An environmental baseline;
- Evaluation of environmental impacts;
- Thresholds of significance, which can sometimes be measured in terms of historic and cultural significance;
- Evaluation of short-term and long-term water supply needs;
  - Climate change;
  - Energy;
  - Cumulative impacts;
  - Mitigation measures; and
- Project alternatives. Which are meaningful discussion project alternative that would reduce adverse environmental impacts.

### **Final EIR**

The final EIR consist of:

1. The draft EIR;
2. Comments and recommendations received on the draft EIR;
3. The responses of the lead agency to the significant environmental points raised in the review and consultation process;
4. A list of persons and agencies commenting on the draft EIR; and (5) any other information added by the lead agency. (Guidelines § 15132.)

## **Approval**

After the final EIR is complete, the agency determines whether to approve the project or an alternative to the project.

## **Program and master EIRs**

CEQA provides several optional tools for streamlining environmental review when there is a series of projects or activities the agency is considering. Master EIRs are designed to provide for analysis of broad policy issues, such as cumulative and growth-inducing impacts, to limit the environmental review of subsequent projects. (Pub. Res. Code § 21156.)

Program EIRs generally can be used for the same types of actions as master EIRs, though this streamlining device is reserved for related actions that can be characterized as one large project. (Guidelines § 15168.)

## **EIR Notices**

A minimum of three notices must be prepared and properly filed in connection with the EIR.

1. Notice of preparation of EIR. (Pub. Res. Code § 21080.4; Guidelines § 15082.)
2. Notice of completion of EIR. (Pub. Res. Code § 21161; Guidelines § 15085.)
3. Notice of approval or determination, which is filed and posted after the project is approved. (Pub. Res. Code § 21152; Guidelines § 15094.)

## **Mitigation Monitoring**

When an agency makes CEQA findings for any project that is approved subject to mitigation measures in an EIR, or when an agency adopts a mitigated negative declaration, the agency must impose a mitigation monitoring or reporting program to ensure implementation of the mitigation measures and project revisions that are required by the agency. (Pub. Res. Code § 21081.6.)

## **Subsequent Review**

Ordinarily, only one EIR or negative declaration is prepared for a project. A supplemental or subsequent EIR (SEIR) may be required if another discretionary approval is being considered and: (a) there are substantial changes to the project; (b) there are substantial changes in the project's circumstances; or (c) new information that could not have been known at the time the EIR was certified becomes available and such changes or new information require major revisions to the previous EIR due to new significant environmental effects or a substantial increase in the severity of previously identified significant effects. (Pub. Res. Code § 21166; Guidelines § 15162(a).)

## **Project changes**

Project changes standing alone normally will not trigger requirements for further CEQA review. However, the lead agency must provide a reasoned basis supporting its conclusion that project changes would not result in new or substantially more severe significant impacts. (*American Canyon Cmty United for Responsible Growth v. City of American Canyon* (2006) 154 Cal.App.4th 1062.)

**New information**

New information can trigger an SEIR or subsequent negative declaration only if the information was not known and could not have been known at the time the EIR was certified as complete, shows new or substantially more severe significant impacts, or demonstrates the feasibility of mitigation measures or alternatives previously found infeasible, and is of substantial importance to the project. (Pub. Res. Code § 21166(c); Guidelines § 15162(a)(3).)

**Use of Addenda**

If none of the three triggers for an SEIR exist, then an agency may use an addendum to make changes or additions to the prior EIR or negative declaration. (Guidelines §§ 15164(a), (b).) The addendum does not need to be circulated for public review. (Guidelines §§ 15164(c), (d).) A brief explanation of the decision not to prepare an SEIR should be included in the addendum, the findings, or elsewhere in the record. (Guidelines § 15164(e).)

For more information about the CEQA process, please visit [opr.ca.gov/ceqa](http://opr.ca.gov/ceqa)

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**BID AND AWARD**

## 4.1 | Bid Procedures

Once DSA has approved the drawings and specifications for a project, the PM/CM/PE shall initiate the bid process for the project.

Prior to the bid process, the PM/CM/PE must contact OUSD's Local Business Utilization (LBU) consultant to request an analysis of the available contractor that could bid on the project. Based on the availability of contractors to bid the project, the LBU consultant could determine what the LBU requirements are for the bid.

OUSD must publicly bid all construction projects with a construction contract value over \$15,000.

The following steps are required to advertise the project:

1. The PM/CM/PE prepares the request for advertisement form and reviews it with the executive director of Facilities Planning & Management and bid coordinator.
2. The architect reviews the drawings and specifications to verify the documents are in conformance with the OUSD design standards. Once verified, the executive director of Facilities Planning & Management will approve the request for advertisement form.
3. The PM/CM/PE submits the request for advertisement form to the bid coordinator to prepare the bid advertisement and the front-end documents.
4. The bid coordinator prepares the invitation to bid for the various newspapers and websites where the project will be advertised.
5. In conformance with the technical specifications and the DSA approved drawing set, the bid coordinator prepares the front-end specifications.
6. The PM/CM/PE completes a final review of the compiled set of drawings and specifications before sending to East Bay Blueprint for copying and distribution to the various plan rooms. An additional copying shall be completed at the PM/CM/PE's request.
7. The bid coordinator will deliver one complete full-size set of drawings, one complete specifications manual, one digital copy of each, and all other bid documents to the documents controller for filing in the plan room.
8. The bid coordinator will distribute the invitation to bid via e-mail to the following people:
  - a. PM/CM/PE
  - b. PLA Administrator
  - c. Local Business Program Administrator
  - d. OUSD Labor Compliance Officer

### **Informal Bids for contract values of less than \$15,000**

If a contract value is less than \$15,000 the PM/CM must obtain three competitive proposals prior to making a recommendation to the executive director of Facilities Planning & Management for approval.

### CUPCCA Bid Schedule, contract values between \$15,000 - \$200,000

Per the California State Controller, CUPCCA is the California Uniform Construction Cost Accounting Commission Act. The Act is legislation that was enacted in 1983 to help promote “uniformity of the cost accounting standards and bidding procedures on construction work performed or contracted by public entities in the state” (Section 22001). The Act is a voluntary program available to all public entities in the State, but it applies only to those public agencies that have “opted in” to the provisions set forth by the Act using the processes outlined in the Act. The entirety of the Act is found at Sections 22000-22045.

The Act allows for public project work in the amount of \$60,000 or less to be performed by a public agency’s force account using the public agency’s own resources, or by negotiated contract, or by purchase order (Section 22032(a)). Public projects in the amount of \$200,000 or less may use the informal or formal bidding procedures set forth in Section 22032(b) or (c) of the Act. Public projects at a cost of more than \$200,000 must use formal bidding procedures to let the contract pursuant PCC Section 22032(c).

#### Example:

1st Advertisement Date	10/7/21
Pre-Bid Job Walk	10/14/2021
Bids Due	10/21/21
Board of Education Approval	See Facilities Board Submission Calendar: <a href="https://boedocdepot2.ousd.org/Governing_Board_Agenda_Prep_Schedule_Ending_January_2021/Submission_Calendar_External.pdf">https://boedocdepot2.ousd.org/Governing_Board_Agenda_Prep_Schedule_Ending_January_2021/Submission_Calendar_External.pdf</a>

### Bid Schedule Over \$200,000

A bid should be advertised for a minimum of one week before the date of the pre-bid job walk, and bids should be due a minimum of two weeks following the pre-bid job walk. The two-week window allows an adequate amount of time for contractors to submit any questions regarding the bid documents and for the Architect to issue any addendums as necessary for the projects. Following is an example of a bid schedule.

#### Example:

1st Advertisement Date	10/7/21
2 <sup>nd</sup> Advertisement Date	10/14/2021
Pre-Bid Job Walk	10/15/2021

Bids Due	10/28/21
Board of Education Approval	See Facilities Board Submission Calendar: <a href="https://boedocdepot2.ousd.org/Governing_Board_Agenda_Prep_Schedule_Ending_January_2021/Submission_Calendar_External.pdf">https://boedocdepot2.ousd.org/Governing_Board_Agenda_Prep_Schedule_Ending_January_2021/Submission_Calendar_External.pdf</a>

**See sample form below:**

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## REQUEST FOR ADVERTISEMENT

Instructions: Please fill out form completely and have authorization before submitting to **Juanita Hunter**.

### PROJECT INFORMATION

1. Project Manager: \_\_\_\_\_
2. Project Full Title (as it appears on Bid Invitation): \_\_\_\_\_
3. Project No.: \_\_\_\_\_
4. Project Delivery Method: \_\_\_\_\_
5. Project Bidding Method: \_\_\_\_\_
6. School Address: \_\_\_\_\_
7. Engineer's Estimate: \_\_\_\_\_
8. Project Duration: \_\_\_\_\_
9. Plans and Specs Date: \_\_\_\_\_
10. Liquidated Damages Amount: \_\_\_\_\_
11. Project Description: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. Is this a PLA Project? Yes / No (circle one)
13. Contingency Allowance Amount: \_\_\_\_\_

### PROJECT REQUIREMENTS:

14. License(s) \_\_\_\_\_
15. Yrs of Experience: **5 yrs**
16. In the Field of: **K-12 Construction**
17. 1<sup>st</sup> Advertisement Date: \_\_\_\_\_ 2<sup>nd</sup> Date: \_\_\_\_\_
18. Pre-bid Walk Date: \_\_\_\_\_
19. Bid Opening Date: \_\_\_\_\_ (Dates may change.)
20. Date for Plans and Specs to be ready for pick up: \_\_\_\_\_

### ARCHITECT/ENGINEER INFORMATION (IF APPLICABLE)

21. Firm's Name: \_\_\_\_\_

AUTHORIZATION by Director of Facilities: \_\_\_\_\_

## 4.2 | Bid Procedures

1. OUSD requires that all contractors be pre-qualified before submitting a bid on a project.
2. The bid coordinator will process and track all contractor pre-qualifications.
3. Contractors must be pre-qualified a minimum of five calendar days before the bid due date.
4. Contractors wishing to be pre-qualified with OUSD must complete and submit the "OUSD Pre-Qualification" form to the bid coordinator. The bid coordinator validates all information on the form and submits to the executive director of Facilities Planning & Management for approval. After the executive director of Facilities Planning & Management signs off on the pre-qualification request form, the bid coordinator will issue a letter to the contractor notifying them of their pre-qualification status.
5. Once a contractor has been pre-qualified with OUSD, they can bid on OUSD projects for two years. Contractors are required to renew their pre-qualification every two years.
6. Use the following link to access the website where OUSD's pre-qualified contractor and subcontractor list is stored or verify with the bid coordinator.

<https://www.ousd.org/Page/16904>

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### 4.3 | Addenda Issuance

Clarification must often be made to the bid documents during the bidding period. These clarifications are made part of the bid documents via addenda.

The PM/CM/PE and AOR are to assess addenda to determine any impacts to the bidding contractors and whether any extension to the bid date is needed.

The following procedures describe how the issuance of any addenda for a project will be managed:

1. The AOR prepares the addendum and sends it to the PM/CM/PE for review. The PM/CM/PE will finalize the addendum.
2. Once the PM reviews and approves, the addendum is forwarded to the bid coordinator.
3. The bid coordinator issues the addendum to East Bay Blueprint for distribution to all plan rooms and plan holders.
4. The bid coordinator should also request one complete copy of the addendum from East Bay Blueprint. This copy is to be given to the documents controls specialist for filling with the appropriate project files.
  - All addenda must be issued a minimum of 72-hours before the bid opening date and time.
  - If addenda must be issued within the 72-hour window, the addenda will need to include language that extends the bid date.
5. The bid coordinator should log the addenda that have been issued for each project. Each bidder must acknowledge receipt of all addenda issued for a project. This acknowledgement will be verified when bids are opened.

## 4.4 | Pre-Bid Job Walk

All projects are required to have a mandatory pre-bid job walk. This walk is necessary so that all bidders can visit the project site and present any questions they may have regarding the project and/or the bid documents.

The pre-bid job walk is to be held no sooner than one week after the first advertisement date for a project.

The walk's date, time, and location are specified in the invitation to bid.

Attendance at the pre-bid job walk is mandatory for the following individuals:

1. The project manager/construction manager
2. The bid coordinator
3. The architect & their consultants
4. The project inspector
5. The project labor agreement administrator
6. The local business policy administrator

Site administrators from the specific project site should be encouraged to attend by the PM.

The PM/CM/PE will prepare an agenda for the walk and lead it.

The PM/CM/PE should bring sufficient copies of the agenda to the pre-bid job walk for distribution to all in attendance. If the pre-bid walk was conducted virtually, a copy of the agenda and all documents presented shall be distributed to all participants within one business day of the meeting.

The bid coordinator will prepare a pre-bid job walk sign-in sheet. All in attendance are to sign in during the walk. The sign-in sheet will be distributed after the pre-bid job walk to all attendees. If the pre-bid walk was conducted virtually, all attendees will be required to sign-in via the platform chat. The PM will document all attendees' attendance and distribute the attendee list after the pre-bid job walk.

At the pre-bid job walk, the project labor agreement and the local business policy administrators will discuss the requirements of the PLA and LBU.

The PM/CM/PE will coordinate placement of the contractors' trailer(s) and identify staging area(s). It is important to make the site administrators aware of how long the trailer(s) will be in that identified location and ensure that they do not interfere with the daily operation of the school.

### Working Under the Project Labor Agreement:

In September 2016, OUSD entered into a Project Labor Agreement (PLA) with the Building and Construction Trades Council, AFL-CIO. The key points of the PLA are described below.

1. Letter of Assent
  - a. All general contractors and subcontractors, regardless of tier, must sign a Letter of Assent (LOA). The LOA binds the contractor to the terms of the PLA for the awarded project only. It does not bind any contractor to a union agreement.
2. Using non-union workers
  - a. A non-signatory contractor may use up to five (5) of its own "core" employees on a project, provided the first worker hired comes from the union, second worker is "core," third worker is from the union, fourth worker is "core," and so forth. All "core" employees are required to pay union initiation and representation fees. The definition of a "core" worker is an individual who:
    - possesses any license required by state or federal law for the project work to be performed;
    - has worked a total of at least one thousand (1,000) hours in the construction craft during the prior three (3) years;
    - was on the contractor's active payroll for at least sixty (60) out of the one hundred (100) calendar days prior to the contract award; and
    - has the ability to perform safely the basic functions of the applicable trade.
3. Fringe benefit payments
  - a. Non-signatory contractors should note that they are required to make payment on behalf of "core" employees into the established labor-management vacation, pension, or other form of deferred compensation plan, apprenticeship, and health benefit funds for each hour worked.
4. Trucking
  - a. Any trucking at and on the site of construction is covered by the PLA. Owner-operators are also covered.
5. Soils and materials testing and inspection
  - a. Such work performed at the construction site and is a classification for which a California prevailing wage determination has been published is covered by the PLA.
6. Pre-job conference
  - a. The successful general contractor and all subcontractors must attend a pre-job conference with the County of Alameda Building & Construction Trades Council prior to start of construction.
7. District pre-construction meeting
  - a. The successful general contractor and all subcontractors must attend scheduled pre-construction job meetings with the appropriate PM, inspector of record, and DSI personnel, as required.
8. Prevailing wages
  - a. All construction workers must be paid the prevailing wage as determined by the State of California. Benefits are the established labor-management vacation, pension, or other forms of deferred compensation plan, apprenticeship, and health benefit funds for each hour worked.
9. Social justice program
  - a. Local workforce hiring goals

- Oakland residents will perform a minimum of 50% of the hours worked, on a craft-by-craft basis, provided the workers are available, willing, and capable of performing the work.
  - Oakland residents will perform 100% of the apprentice hours worked, provided that such apprentices are available, willing, and capable of performing the work. Apprentices will perform 20% of the total craft hours or the ratio permitted under the state-approved apprenticeship standards.
- b. Off-site credit
- In order to assist contractors in meeting the local hiring goals, contractors can receive up to 50% credit for utilizing residents from the City of Oakland on non-District projects.
10. Method for compliance or good faith efforts
- a. The following are some of the "good faith" steps that a contractor must take to demonstrate that they have made every effort to reach the local hiring goals of the Oakland Unified School District's Project Labor Agreement (PLA). This list is a minimum and additional efforts may be required.
- Attend pre-job meeting and submit workforce projections.
  - Meet with DSI on a monthly or as-needed basis to discuss progress.
  - Submit copies of dispatch requests in writing, with a copy to DSI upon request. Maintain documentation of union response.
  - Contact DSI if union cannot provide local residents as requested.
  - Use "name call," "rehire," or other programs to reach goals when they are available as part of the hiring hall dispatch procedures.
  - Use Cypress Mandela or other local resources if the union cannot provide residents as requested.
  - Submit copies of DAS 140 form to DSI.
  - Sponsor local residents for apprenticeships when possible.
  - Submit an off-site utilization form for Oakland apprentice hours worked on non-district projects.
  - Show specific efforts to reach the goal of 20% local utilization of apprentices.

**Local Business Utilization (LBU) Policy Sheet:**

**Policy Established:** December 2008 by the Board of Education for the Oakland Unified School District.

<https://ousd.legistar.com/LegislationDetail.aspx?ID=4892932&GUID=FA019339-B62B-45BF-AA6A-5B76EB5E7597&Options=ID|Text|&Search=Local+Business+Policy> **Policy Goal:** To encourage the utilization of local and small local businesses based in Oakland.

**Policy Amended:** As of April 28, 2021, the OUSD LBU policy has been amended with the intent to expand the number of eligible contractors by accepting Oakland-based firms that are currently certified by the following agencies:

- [The City of Oakland](#)
- [The Port of Oakland](#)
- [Alameda County Transportation](#)
- [Alameda County](#)

- [California Public Utilities Commission](#)
- [Caltrans](#)

**Definitions:**

1. LBE (Local Business Enterprise) – A firm located in Oakland and certified as an LBE by the City of Oakland and/or one of the listed agencies.
2. SLBE (Small Local Business Enterprise) – A firm located in Oakland and certified by the City of Oakland as an SLBE or VSLBE, and/or one of the listed agencies that meets the City of Oakland’s small business size standards.
3. SLRBE (Small Local Resident Business Enterprise) – A firm certified by the Oakland Unified School District that meets all the criteria for the SLBE and whose owner is a current City of Oakland resident.

**The following is a description of how the policy applies to District contracts:**

1. Requirement
  - There is a 50% local business participation requirement on all District capital program construction and construction-related professional services agreements.
2. Meeting the requirements
  - The 50% local business utilization requirement can be met with 25% (or less) local business enterprise (LBE) participation AND 25% (or more) small local and/or small local resident business (SLBE/SLRBE) participation.

**Certification**

1. The District manages the Small Local Resident Business Enterprise (SLRBE) certification program. To become certified as a SLRB enterprise, a firm must:
  - Submit proof of City of Oakland certification as a Small Local Business Enterprise (SLBE) or Very Small Local Business Enterprise (VSLBE). Firms certified by other accepted local agencies MUST also submit three years of tax returns as indicated on the supplemental E documents.
  - Submit verification of the firm owner's City of Oakland residency.

**To receive participation credit, all LBE, SLBE, SLRBE, or equivalent firms must be certified before bid submittal. Upon submittal, firm information will be reviewed and approved for responsiveness and bid discount.**

## 4.5 | BID OPENING AND ANALYSIS:

On the day bids are due, all bids will be received at the OUSD Facilities front office located at 955 High Street. Upon receipt, each bid will receive a date and time stamp.

The bid coordinator will prepare the bid tabulation sheet and bring copies to the bid opening.

Bids will be opened and read by the bid coordinator. An OUSD representative will attend the bid opening as a witness. Due to the Covid-19 pandemic, no in-person bid openings are taking place. Results of the bid openings will be issued to (what parties?) via e-mail within 24 hours.

The bid coordinator will record each bid as it is read. Also, the coordinator will note the required documents that must be submitted with each bid.

### **All bids must include the following items to be considered responsive:**

1. The bid form must be signed,
2. The bidder must acknowledge all addenda, and have noted this on the bid form,
3. A bid bond must be included,
4. The bid form must have all subcontractors listed that are over 1½% of the total bid price,
5. A signed non-collusion affidavit,
6. DVBE documentation,
7. Local business participation worksheets,
8. Debarment suspension and schedule Z,
9. Site visit certification,
10. Iran contract certification, and
11. Any other included forms as applicable.

### **Once the bids have been opened and read, the bid coordinator will perform the following tasks:**

1. Type up the bid tabulation worksheet.
2. Send a copy of the three lowest bids to the local business policy administrator, along with the local business participation worksheets that each bidder submitted.

Once the local business administrator has reviewed the bidders' local business participation worksheets, the administrator will send an analysis letter via e-mail to the PM, the bid coordinator, and the executive director of Facilities Planning & Management. This letter will identify the low bidder's participation percentage and qualifications.

After the bid coordinator has received this letter, the bid tabulation worksheet will be updated as necessary to reflect any changes.

Once the bid tabulation worksheet is completed, the bid coordinator will distribute it to the project manager/construction manager and post a copy on the OUSD Facilities Division's website.

The bid coordinator will provide a complete copy of the low bid for the project to the PM, including the bid form, the bid binder, pre-qualification letter, non-collusion affidavit, subcontractor lists, and local business participation forms. The PM will use this information for the preparation of the contract award documents.

The PM shall save all documents by date and description to the appropriate project files.

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## 4.6 | Rejections of Bids

It is necessary occasionally to reject any or all the bids on a project.

### **Some of the reasons for bid rejection include:**

1. It is in the best interest of OUSD.
2. All bids received are over the project budget.
3. No bidders submitted a responsive bid.
4. Due to program changes, the District made the decision to not move forward with the project.

### **Once the decision has been made to reject bids on a project, the following steps must be taken:**

1. The bid coordinator will prepare the rejection of bids letter(s) and submit hard copies to the executive director of Facilities Planning & Management for signature.
2. Once signed by the executive director of Facilities Planning & Management, the letter(s) will be distributed to all the contractors that submitted a bid on the project.
3. The bid coordinator will submit to the PM/CM/PE to file in the appropriate project file.
4. A notice of rejection of bid is posted to the OUSD Facilities Procurement website.

### **CANCELATION OF BIDS:**

The executive director of Facilities Planning & Management or deputy chief hold sole authority to cancel a bid. Bidders will be notified by the bid coordinator and a post on the OUSD Facilities Procurement website.

## 4.7 | BID AWARD PROCEDURES:

Once the responsive low bidder has been determined and verified by the local business administrator, per Section 4.6, the PM will prepare the bid award documents.

### **The bid award documents include:**

1. The notice of intent to award letter
2. An agreement request for low bid contractor, LBU analysis, and bid tabulation sheet
3. Request for signature cover sheet

### **Notice of intent to award letter**

- The letter is prepared by the PM/CM/PE and the form printed out for signature.
- This letter once signed by the deputy chief or executive director of Facilities Planning & Management, notifies the contractor they are being awarded the bid and requests the contractor move forward with their bonds, insurance, and the PLA letters of assent within seven days.

### **Agreement request for low bid contractor**

- The agreement request is prepared by the PM/CM/PE and the form printed out for signature. This form includes all the information that will be necessary for the contract administrator to prepare the contract. The executive director of Facilities Planning & Management and deputy chief sign this form.

All the above documents are to be submitted to the executive director of Facilities Planning & Management and deputy chief in one package.

**Once all documents are signed, they are to be distributed to the following:**

1. Notice of intent to award - Send to the contractor via e-mail.
2. Agreement request form - Send to the contracts specialist for processing of the contract.

The PM/CM/PE will file a copy of the signed notice of intent to award letter, acceptance of bid memo, and agreement request form on the server in the appropriate project file folder

The contract specialist will prepare the contract and e-mail it to the contractor with a request to sign and return three wet copies, along with the required insurance documents.

**See sample forms below:**



Mr. Yong Kay  
Bay Construction  
4020 Martin  
Oakland, CA 94601

**Re: Oakland Unified School District  
Video Surveillance Project Glenview Elementary  
Project No.  
Notice of Intent to Award**

**Dear Mr. :**

This letter shall serve as **Notice of Intent to Award** the Construction Contract pending approval by the Board of Education, of your contract with the Oakland Unified School District based on your bid submitted on **August 31, 2020** in the amount of **\$50,000.00**. Upon Board action, we will forward to your office the Agreement an optional "Escrow Agreement in Lieu of Retention" in the Lieu of Retention forms for processing. Upon receipt, should you find these forms acceptable, please sign and return all copies to OUSD for execution.

In order to issue your contract and Notice to Proceed, the following document need to be submitted within seven (7) calendar days, by **September 1, 2020** to: **XXXXXXXX, Project Manager** for this project at Oakland Unified School District, 955 High Street, Oakland, CA 94601:

- A. Performance Bond (Admitted in California) with a penal sum of one hundred percent (100%) of the value of the total cost of the project. Name Oakland Unified School District and Project Manager as Additional Insured and reference the specific projection the certificate.
- B. Local contact for surety, with name, phone number, and address to which legal notices may be sent. Name Oakland Unified School District and Project Manager as Additional Insured and reference the specific project on the certificate.
- C. Certificates of Insurance (Admitted in California. Name Oakland Unified School District and Project Manager as Additional Insured and reference the Specific project on the Certificate.
- D. Certificate of Insurance (Admitted in California)
  1. Public Liability Insurance, including Comprehensive General Liability Insurance as outlined in the General Conditions.
  2. Worker's Compensation Insurance, as outlined in the General Conditions.
  3. Automobile Liability Insurance Policy as outlined in the General Conditions.
  4. Name Oakland Unified School District as loss payee. All certificates must give a thirty (30) day notice to Oakland Unified School District of insurance policy cancellation or reduction in coverage.
  5. Builders Risk Insurance. Name Oakland Unified School District as loss payee. All certificates must give a thirty, (30) day notice to Oakland Unified School District of insurance policy cancellation or reduction in coverage.
- E. Provide confirmation by **(Bay Construction)** and by all of **Bay Construction subcontractors** to the OUSD Project Labor Agreement – (PLA), by return of the Letter of Assent, to Davillier-Sloan, Inc.



Department of Facilities Planning and Management

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**Bay Construction** will provide an original, signed copy of the Letter of Assent for themselves and their subcontractors to:

**OUSD PLA Administration**  
**Davillier-Sloan Management Consultants**  
**Attn: Maribel Alejandre, Regional Labor Relations Manager**  
**1620 12<sup>th</sup> Street, Oakland, CA 94607**  
**PH (510) 835-7603**  
**FX (510) 835-7613**  
[maribel@davillier-sloan.com](mailto:maribel@davillier-sloan.com)

Bay Construction will also provide an original signed copy of their letter of Assent to:

OUSD Facilities Planning & Management  
XXXXXXXX, Project Manager  
955 High Street, Oakland, CA 94601

Time is of the essence for this project, so please expedite the delivery of the above listed documents. These documents must be received and a contract must be executed before a **"Notice to Proceed"** can be issued.

If you have any questions, please feel free to give **XXXXXXXX, the Project Manager** a call at (510) XXX-XXXX and/or his/her mobile, (510) XXX-XXXX.

Very truly yours,

Tadashi Nakadegawa, Deputy Chief, Facilities Planning & Management

Cc: Juanita Hunter, OUSD Contract Administrator  
Kenya Chatman, Executive Director, Facilities Planning & Management  
Maribel Alejandre, OUSD PLA Administration

## 4.8 | BONDS AND INSURANCE:

### **Payment bond requirements**

1. Pursuant to Public Contract Code section 3247, every contractor awarded a contract by a public entity (except for state contracts) involving an expander in excess of \$25,000.00 for any public work shall, before entering upon the performance of the work, file a payment bond in a form approved by the public entity for whom the contract is awarded.
2. Pursuant to public contract code section 3248, the payment bond must be in an amount no less than 100% of the total amount payable by the terms of the contract.

### **Performance bond requirements**

3. Pursuant to the California Government Code section 66499.1, whenever security is required in connection with the performance of any act or agreement, the security shall be subject to the approval of the local agency.
4. Pursuant to the California Government Code section 66499.2 and OUSD mandate, the amount of the bond must be 100% of the total amount payable under the terms of the contract.

## 4.9 | NOTICE TO PROCEED:

Before a contractor can begin any construction activities, it must receive a Notice to Proceed (NTP) letter from OUSD.

The NTP letter cannot be issued until a board-approved contract is in place. It is the PM's responsibility to track the contract from the time the agreement request is submitted to the contract administrator to the final board approval.

Once the PM has verified board approval of the contract, the PM will prepare the NTP letter.

The NTP letter is to be submitted to the Executive director of Facilities Planning & Management for review and then forwarded to the deputy chief of Facilities for signature. A request for signature cover sheet should be attached to this letter.

### **The signed NTP letter should also be forwarded via e-mail to the following:**

1. The architect
2. The inspector of record
3. The OUSD labor compliance department
4. The project labor agreement administrator
5. The local business policy administrator

**Prior to issuing the NTP letter to a contractor, it is the PM's responsibility to make sure that board-approved contracts are in place for the following:**

1. Inspector of record

2. Special inspections firm
3. Geotechnical engineering firm
4. Hazardous materials abatement testing
5. Any other miscellaneous contract that will be necessary during the construction phase

**See sample form below.**

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Department of Facilities Planning and Management

September 1, 2019

Mr. Yong Kay  
Bay Construction  
4020 Martin  
Oakland, CA 94601

**NOTICE TO PROCEED**

You are notified that the Contract Time under the above Contract (\_\_\_\_\_ [\_\_\_\_\_] calendar days) will commence to run on \_\_\_\_\_, 20\_\_\_\_. By that date, you are to start performing your obligations under the Contract Documents. In accordance with the Agreement, the deadline for completion is \_\_\_\_\_, 20\_\_\_\_.

You must submit the following documents by 5:00 p.m. of the TENTH (10th) calendar day following the date of this Notice to Proceed:

- a. Contractor's preliminary schedule of construction.
- b. Contractor's preliminary schedule of values and schedule of values for all of the Work (see General Conditions §9.2.1.A, and Special Conditions §16).
- c. Contractor's preliminary schedule of submittals, including Shop Drawings, Product Data, and Samples submittals
- d. Contractor's Safety Plan specifically adapted for the Project.
- e. A complete subcontractors list, including the name, address, telephone number, email address, facsimile number, California State Contractors License number, license classification, Department of Industrial Relations registration number, and monetary value of all Subcontracts.

Thank you. We look forward to a very successful Project.

Sincerely,

Tadashi Nakadegawa  
Deputy Chief of Facilities  
Division of Facilities Planning and Management

Cc: PM  
Labor Compliance



5.0

**PRE-CONSTRUCTION AND CONSTRUCTION**

## 5.1 | Startup Checklist

After the PM sends the NTP to the GC, the PM needs to set up a pre-job meeting with the union hall to discuss the PLA and a pre-construction meeting with the GC to discuss project start-up logistics.

This checklist is the order in which the pre-construction meeting for a project should proceed:

1. The PM/CM/PE must fill out the project information form supplied by PLA consultant (stored in the P: drive under standard forms in the PLA folder) prior to the pre-job meeting. The PLA consultant will use this information to arrange the pre-job meeting at the union hall.
2. The project information form is to be sent to by the PM/CM/PE to the PLA consultant and the certified payroll coordinator. The certified payroll coordinator who will establish the project in Elation Systems.
3. The PM/CM/PE will submit with the project information form a complete list with all the subcontractor's information, names, addresses, contractor's license number, phone numbers, etc. to (insert recipient).
4. The GC must collect signed letters of assent from all tiers of subcontractors and returns them to the PLA consultant.
5. The PM/CM/CE will inform the site administrators that the project has been bid and is moving forward. The PM/CM/PE will confirm placement of the contractors' trailer(s) and identify staging area(s). It is important to make the site administrators aware of how long the trailer(s) will be in that identified location and ensure that they do not interfere with the daily operation of the school.
6. The General Contractor and all subcontractors listed at the time of bid must complete the PLA meeting before construction can commence.
7. Ensure all contracts are in place prior to start of construction.
8. Conduct the Colbi Technologies training for the ColbiDocs system on projects over \$5 million dollars.
9. The GC shall submit to the PM/CM/PE hourly rates for any future change order.

## 5.2 | Preparations for Construction and Site Coordination Process

Preparing well for the start of a project can mean the difference between it being successful or unsuccessful. The PM/CM/PE should have all project folders setup, all necessary documents sent to the general contractor in advance and have competent knowledge of the project drawings prior to starting any construction activities. In reviewing the drawings, the PM/CM/PE may be able to identify a design issue, and address it ahead of time, to prevent any potential delays. Review the checklist below and use it as a tool for preparation:

1. Set up the project folders on the G: drive.
2. Setup the project in ColbiDocs & Accountability.
3. Set up a meeting with site administration and create a contact list for emergencies and other project-related correspondences.
4. Take photos of existing conditions. No existing condition is too small or too large to document. Take particular interest in curbs, sidewalk cracks, softscape, storm drains, fencing, and adjacent facades.
5. Generate a sign-in procedures for project-related personnel.
6. Discussing with the site locations for contractor's trailer, construction laydown area, and site safety fencing.

Phased projects may require additional coordination with site administration and Facilities leadership. These projects often require interim housing and transportation of students.

## 5.3 | Preconstruction Meetings

The PM/CM/PE will setup a pre-construction meeting after the pre-job meeting is completed. The pre-construction meeting should occur at the project site to address any issues. The PM will provide an agenda to address the District's requirements, issues, and procedures.

### **This meeting should include:**

1. The architect, IOR, and main consultants.
2. The general contractor and their major subcontractors (electrical, plumbing, mechanical, etc.).
3. The District's fire alarm and intrusion consultants.
4. Site administrators or staff who will be involved in the project.

### **The agenda topics should include:**

1. Construction schedule, which must be submitted within ninety days.
2. Outline expectations for three weeks' look ahead schedule reporting and monthly updates.
3. Outline expectations for how the schedule of values must be approved before the first pay application can be submitted and discuss how the owner's allowance is to be shown on the schedule of values, as well as how it will be used for AEDs.
4. Discuss phasing (if applicable).
5. Discuss moving coordination.
6. Discuss PG&E and EBMUD applications (if applicable).
7. Discuss trailer location, keys, and temporary codes needed (intrusion and fire alarm).
8. Discuss procedures for working on new and existing fire alarm and intrusion systems. Provide contact names and numbers.
9. Provide an emergency contact list for both the contractor and district personnel.
10. Review expectations for the submittal process per specification.
11. Review expectations for the RFI process and format.
12. Review expectations for the AED/PCO process and format.
13. Review expectations for the inspection request process.
14. Review expectations for pay application processing and labor contribution check process (dates to submit, releases, and certified payroll). The labor contribution check process is controlled by the certified payroll coordinator.

## 5.4 | Temporary Keys and Security Codes

### **Temporary Keys:**

The PM/CM/PE will e-mail the deputy chief coordinator a list of keys and quantities of each needed. It will take approximately three to four days to get the keys.

The PM/CM/PE will create a transmittal listing what keys the GC received. The GC or their representative will sign the transmittal to receive the keys. The PM will remind the GC that they must return all supplied keys at the end of the project and will be held responsible for lost or stolen keys.

At the end of the project, the PM/CM/PE will gather all keys and compare them to the original inventory listed on the transmittal. If all keys are not returned, the PM, with coordination from the locksmith, will need to determine if the lost keys are a security issue. The GC may be held responsible for all costs incurred from rekeying the site.

### **Permanent Keys:**

For permanent keys associated with new construction, the PM/CM/PE will coordinate with the OUSD locksmith and GC. Steps include the following:

- Confirm keyway with the OUSD locksmith and coordinate with the GC. Allow up to one week.
- Confirm the biting list with the OUSD locksmith (allow up to 10 business days).
- Review the hardware list and school floorplan with the OUSD locksmith. During this step the PM/CM/PE will be assigning the different keys to the different spaces. There may also need to be coordination with the site administrator regarding how to key certain spaces (allow up to two weeks).
- When ready, the OUSD locksmith will provide a letter of authorization to be provided to the keying contractor.

At the end of the project, the PM/CM/PE will provide one set of keys for the building to the OUSD locksmith shop with the associated transmittal form.

A walk of the site may be required to acclimate the OUSD locksmith to new building/space.

If OUSD locks are required for gates, etc., the PM will coordinate the work with OUSD locksmith. Building keys will also be needed for fire department Knox boxes installed on site. Coordinate with B&D to have chains welded to the gates

### **Security Codes:**

Before any work begins on the fire alarm or intrusion systems, the PM/CM/PE needs to get temporary codes for the GC. These codes can be acquired through the B&G alarm division.

The PM/CM/PE will initiate the code request seven-days in advance via an e-mail to the alarm shop. The PM/CM/PE will copy the alarm shop. The e-mail will serve as the transmittal request. In the e-mail, the PM/CM/PE should indicate who the code is for, what the code is for, what site, and for how long the code is needed.

Once confirmed by the alarm shop, the PM/CM/PE will respond via e-mail with a calendar reminder of the date codes are expected to be deleted (likely at the end of the project). At the end of the project, the PM will coordinate with the alarm shop on whether to extend the code or terminate access.

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## 5.5 | Schedule Development and Updating

### **Purpose:**

The purpose of this section is to be able to accurately track a project's schedule and complete the project on time and within budget.

1. At the beginning of the project, the PM/CM/PE should set up a meeting with Facilities leadership to determine a preliminary project schedule. Once that preliminary schedule is generated, it should be included in the RFP/Q process for selecting an architect. After an architect/engineer has been selected, the PM should conduct a meeting with the program manager and facilities leadership for refinement of the preliminary schedule. All schedules should include at a minimum all significant activities which would typically include:
  - a. Onboarding of an architect,
  - b. environment site assessments, and other pre-design/pre-construction consultants,
  - c. site acquisition,
  - d. schematic design,
  - e. design development,
  - f. construction drawings,
  - g. minimum two-week review period by the district (B&G) at the end of each phase,
  - h. constructability review prior to DSA submission,
  - i. DSA submittal and review period,
  - j. DSA backcheck,
  - k. bidding process (including advertising, pre-bid walk, bid, bid review),
  - l. contracting time allowance,
  - m. notice to proceed,
  - n. construction (as defined by the contract documents),
  - o. substantial completion,
  - p. punch list,
  - q. closeout, and
  - r. holidays.
  
2. No matter the size of the project, each projects needs a detailed project construction schedule and contractor narrative monthly. This report needs to be generated and updated by the GC monthly per the specifications under scheduling update procedure. This monthly update is also tied to the monthly pay application, which will not be approved without the schedule update. This is also stated in the specifications. As per the specifications, the submitted schedule should be either Microsoft Projects or Primavera P6 native format and submitted in PDF. The GC is required to submit an updated schedule with each pay application. The PM/CM/PE, architect and IOR need to review the schedule and make sure the percentage complete shown on the schedule update matches the pay application. The PM/CM/PE needs to notify the GC in writing within 10 days whenever schedule slippage occurs. This written notification should typically request a recovery schedule from the GC.

3. The PM/CM/PE needs to be thoroughly familiar with the district’s scheduling requirements as defined in the general conditions of the front-end documents, section 3.9.1. The PM is responsible for making sure the GC strictly complies with this scheduling specification.
4. All time extension requests from the GC must be requested in writing. The request must state the reason for the delay, and include supporting schedule “fragments” as detailed in the contract documents. The GC shall identify cost impacts to the project due to the extension. The request shall be in the format of change order request. The time extension will also need to be Board of Education approved via a change order.

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## 5.6 | Utility Tie-Ins and Shutdown

### **Purpose:**

All contractors must make every effort possible to schedule utility shutdowns on non-school days. However, when that is not possible the contractor must give the PM/CM/PE at least 48 hours' notice for all shutdowns.

The contractor will be held responsible for all financial back charges if water is shutdown occurring while school is in session last longer than 59 minutes. A mandatory dismissal of the school will occur if water is off for 60 minutes.

Any project involving a new power service, water meter, fire sprinklers, or fire hydrant will involve acquiring engineering and permits from PG&E, EBMUD, or phone and internet service provider(s). In some cases, these permits will be the responsibility of the GC, but for most projects, it will be the PM's responsibility.

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## 5.7 | Weekly Construction Meetings

Meeting minutes are very important and a great management tool for tracking all action items issues. They are a critical part of the official record. Minutes are mandatory and need to be taken for all project meetings and should be written in a manner that someone not familiar with the project can follow the issues. Meeting minutes are a summary of discussions, decisions, and items needing action; they are not a written transcript of the meeting.

At the choice of the PM/CM, the weekly construction meeting minutes may be taken by the PM/CM/PE, engineer, or architect. (This responsibility is listed as a task in all architectural contracts.) If the architect takes the minutes, the PM/CM/PE is responsible for reviewing them and verifying their accuracy.

Meeting minutes are issued within seventy-two hours of the meeting to all parties and shall include all exhibits shared during the meeting. The minutes should be reviewed by attendees with their edits returned to the author within twenty-four hours of issuance, so they can be incorporated into the final document. Final meeting minutes shall be distributed to all attendees and filed in the appropriate project file.

The meeting minutes format should include a project summary on the first page. The summary should include the following items:

- NTP date
- Project duration
- Contract completion date
- Days elapsed from NTP date
- Projected completion date
- Original contract amount
- Total value of approved change orders or AEDs
- Current contract amount
- All attendees (to be updated weekly)
- Use to track delays, submittals, RFIs, ASIs, etc.

All meeting minutes should track a project's issues by item number, description, responsible party, and date required completion date. A sample meeting template can be found on the G: drive under standard forms/meeting minutes. See sample attached.

In addition to the weekly construction meetings, minutes should be kept for all design, site administrator, public agency, utility company, and community meetings.

# Meeting Minutes Sample:



## WEEKLY CONSTRUCTION PROGRESS MEETING NO. 177

**Fremont High School Modernization and New Construction**  
**Inc. 3 - Building B Renovation, Inc. 4 - New Football Field, Gymnasium & Wellness Center, Inc. 4A - Library Renovation**  
 4610 Foothill Blvd  
 Oakland, CA 04601

OUSD Project No: 13158  
 DSA File No. 1-H8  
 Application No. 01-116833

Date	Time	Next Meeting
December 22, 2021	10:00 AM	December 29, 2021 10:00 AM (Wednesday)

Purpose	Location
Construction Progress Review	Fremont High School CFJV Construction Trailer

Attendees			
Kenya Chatman (KC), OUSD kenya.chatman@ousd.org	Walter Jones (WJ) LCA wjones@lca-architects.com	* Nick Misakian (NM), CFJV nmisakian@cahill-sf.com	*
Paul Orr (PO), CBCM paul.orr@ousd.org	Shabnam Gruenholz (SG) LCA sgruenholz@lca-architects.com	* Jabari Herbert (JH), CFJV focon_jabari@cahill.com	*
JaQuan Cornish (JC), CBCM jaquan.cornish@ousd.org	Ken DeCarlo (KD), KDI ken@kdiconsultants.com	* Dylan Strangmeyer (DS) CFJV dstrangmeyer@cahill-sf.com	*
Philip Lang (PL) LL&A Philip@lusterassociates.com	Brian Estes (BE), KDI brian@kdiconsultants.com	John Lewis (JL) CFJV focon_john@cahill-sf.com	
Andrea Lowe (AL) Lower alowe@lowecg.com	John Opacic (JO), KDI johnopacic@oriontrinity.com	Oscar Guillen (OG) CFJV oguilien@cahill-sf.com	*
Jorge Velasco (JV) Lowe jvelsaco@lowecg.com		Sabina Nieto (SN) CFJV snieto@cahill-sf.com	*
Imelda Meza (IM), HC imelda.meza@ousd.org		Chuck Steele (SN) CFJV csteele@cahill-sf.com	*
Vacations:	KD: 12/16-1/2 WJ: 12/21-1/2	NM: 12/27-12/31 SN: 12/24-12/31	

\* Indicates Attendance

### Project Summary

Increment #3 Notice to Proceed:	4/19/2019	Increment #4A Notice to Proceed	3/29/2021
Increment #3 Construction Start:	6/10/2019	Increment #4A Construction Start:	3/29/2021
Increment #3 Substantial Completion (Original):	7/31/2020	Increment #4A Substantial Completion (Current)	12/27/2021
Increment #3 Substantial Completion (Current):	12/31/2020	Increment Original Contract Time:	\$ 3,568,980
Increment Original Contract Time:	417 days	Increment 4A Time Elapsed:	261 days
Increment #3 Time Elapsed:	451 days	Increment 4A Percent Time Elapsed	97%
Increment #3 Percent Time Elapsed	108%		
		Increment 1 Contract Amount	\$ 7,093,095
		Increment 2 Contract Amount	\$ 18,339,992
		Increment 3 & 4 Contract Amount	\$ 69,868,139
		Addendum 4A	\$ 3,568,980



Increment #4 Notice to Proceed:	1/10/2019	Total Contract Value	\$ 96,870,206
Increment #4 Construction Start:	5/6/2019		
Increment #4 Substantial Completion (Original):	11/2/2020	Total Earned Less Retainage 12/22/21	\$ 94,436,928
Increment #4 Substantial Completion (Current):	12/31/2020	Balance to Finish, Plus Retainage	\$ 4,433,278
Increment #4 Original Contract Time:	605 days		
Increment #4 Time Elapsed:	639 days		
Increment #4 Percent Time Elapsed:	105%	Overall Project Completion Percentage	97%

**Meeting Minutes**

<u>Item</u>	<u>Action/Description</u>	<u>Due</u>	<u>BIC</u>
<b>A. Site Safety and Housekeeping</b>			
18.A.53	<u>12/15/2021</u> Continue to assure workers are following construction zone protocols. CS noted emergency access issues at Foothill Blvd, OUSD project team has continuously advised site administration that this is a fire life safety issue. *Sewer Lateral: CFJV working with EBMUD to receive a parcel certification and PJOB signoff.	Informational	CFJV
<b>B. Local Business Utilization</b>			
1.B.16	<u>12/15/2021</u> Please continue to include all LBU reports with monthly billings. JC will forward to new Local Business Utilization Consultants Luster & Associates/Lowe. Please provide reports before the 28th of each month.	Informational	Team
2.B.25	<u>12/15/2021</u> JV requests that documentation is provided in a prompt manner to schedule prejob meetings for new subs. JV provided preliminary September hire percentages: 44.87/50% and 12.85/20%. Also, please submit any off-site credits for review and approval. PL mentioned an outreach meeting is scheduled for 12/7 and will provide the flier to the team.	Informational	Team
<b>C. Schedule Review</b>			
1.C.74	<u>12/15/2021</u> Increment 2: Beneficial Occupancy: <u>August 12, 2019</u> Increment 3: Beneficial Occupancy: <u>December 31, 2020</u> Increment 4: Beneficial Occupancy: <u>December 31, 2020</u> Increment 4A: Construction Completion: <u>December 27, 2021</u>  *Within Inc. #3: *FPT is scheduled remotely on 11/18 & 11/19, physical testing is scheduled for 11/23. *Within Inc. #4: *FPT is scheduled remotely on 11/18 & 11/19, physical testing is scheduled for 11/23. *Within Inc. #4A: *See attached 3 week look ahead schedule	8/12/2019 12/31/2020 12/31/2020 12/27/2021	CFJV CFJV CFJV CFJV
<b>D. Submittals Status Review</b>			
1.D.25	<u>12/15/2021</u> Increment 4A: See attached log	On-going	LCA



**Meeting Minutes**

<b>Item</b>	<b>Action/Description</b>	<b>Due</b>	<b>BIC</b>
<b>E. RFI Status Review</b>			
1.E.26	<u>12/15/2021</u> Increment 4A: See attached log	On-going	LCA
<b>F. Bulletins</b>			
1.F.84	<u>12/15/2021</u> Increment 3: N/A Increment 4: N/A Increment 4A: N/A	Informational	LCA
<b>G. PCO / CO Status Review</b>			
2.G.32	<u>12/15/2021</u> *Inc. 4A formal CCRs coordination continues. See attached PCO log. *PO noted credit for concrete demo at south elevation steel	Informational	CFJV/OUUSD
<b>H. District Concerns</b>			
4.H.52	<u>12/15/2021</u> CHPS: *Awaiting completion of commissioning for documentation for final submission.	On-going	LCA/OUUSD/CFJV
8.H.88	<u>12/15/2021</u> *PO mentioned working with City of Oakland to get PJOB signed off while working with EBMUD on certification *PO mentioned FA sync issues. Coordination continues with JCI/CFJV/EDC.  <u>12/15/2021</u> DTSC & Ninyo & Moore coordination continues. Working through PEA comments, RAW and additional sampling proposals.	On-going	OUUSD
<b>I. Inspector Concerns</b>			
36.I.60	<u>12/15/2021</u> * Door pressure issues are still on-going. IR to correct small list of door adjustments is being worked through. *KD and CFJV are working together to complete the preoccupancy checklist.	On-going	KDI/CFJV
<b>J. Contractor Concerns</b>			
33.J.60	<u>12/15/2021</u> *SN mentioned issues with safelinc, coordination is on-going. JC reached out to JCI to review. JCI confirmed safelinc is operating. *NM mentioned RTU sheave replacement. NVH working on formal quote to proceed.	On-going	CFJV
<b>K. Architect Concerns</b>			



## 5.8 | Submittals

Submittals are an integral part of the work performed by the contractor in the execution of the contract. Submittal review includes the AOR/EOR, CM, and other parties required by the contract documents. Most submittals relate to the technical requirements, which may include products, assemblies, and samples. Others relate to the administrative requirements, such as the project schedules and schedule of values. In all cases, the CM/PM ensures that all submittals are appropriately received, reviewed, and tracked.

Submittals are often an issue on projects, and the OUSD specifications clearly state the general contractor is to have all submittals submitted within thirty-days of the NTP. However, many project still have submittals delivered months later for site work and miscellaneous products installed at the end of a project. The PM/CM/PE must be focused on this requirement as submittals can cause delays in ordering materials and potentially delay the project. The CM/PM must also pay close attention to substitutions submitted by the GC, as the GC may be looking to save money. If there are savings, The District should get credit for them. Additionally, the PM/CM/PE should flag for review any substitutions that do not conform to the specifications and confirm with B & G, and Facilities leadership that the substitution is an acceptable product.

The submittals should always be included in the full schedule and linked to the task they affect. They will be reviewed and verified during the analysis of the entire project schedule. To alleviate late submittals, OUSD will tie itemized submittals to the schedule of values.

It is the contractor's responsibility to produce submittals in a timely fashion. It is the responsibility of the architect and the PM to manage the general contractor and track all submittals to ensure the project will not be affected by the late submission.

Refer to project specifications covering additional information surrounding the specific timeline process and information about the CM/PM reviewing before AOR can issue.

### **Material Substitutions:**

Substitutions may be allowed when the contractor proposes to substitute a previously specified product with one of similar or better quality. All substitutions require the review and approval of the District and the architect of record.

No substitutions are allowed until approved in writing by the District. The burden of proof as to the quality of any material, process, or article rests with the contractor. The contractor warrants that if substitutions are approved:

- The proposed substitution is equal or superior in all respects to the one originally specified.
- The contractor provides the similar or superior warranties and guarantees for the substitute as specified.
- The contractor is fully responsible for the installation of the substitute.

- The contractor is responsible for any re-design costs incurred by the District's acceptance of any substitute.
- If the contractor proposes to furnish any material, process, or article that is more expensive than one originally specified, the contractor bears the difference in cost unless otherwise approved in writing by the District.

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## 5.9 | Request for Information

A request for information (RFI) is a written request from the contractor for additional information to clarify or resolve any issues arising from the contract documents or address issues that have arisen due to field conditions. The contractor should discuss with the project inspector any potential solutions and recommendations and include them in the RFI. The CM/PM reviews a list of all outstanding RFIs at each progress meeting.

RFIs are critical to tracking issues and cost changes related to a project, which in most cases create an AED or PCO. No change orders will be created without some form of written backup, such as an RFI, ASI, etc.

The District does not supply an RFI sample or format. It is up to the contractor to submit a sample of the format it will use for approval. The PM should be aware of any contractor that submits excessive RFIs since it could be a sign of either a bad design or a GC fishing for an added cost. This problem will most likely lead to change orders which the CM/PM must make the District aware of.

Refer to the project specifications, which cover additional information surrounding specific timelines, RFI process, and information about the CM/PM reviewing before AOR issuance.

## 5.10 | Request for Information

On August 26, 2020, the District approved a contract with Colbi Technologies to implement ColbiDocs for construction projects. ColbiDocs is an online construction document processing system that replaces EADOC as the District's system for document control. The usual construction-related documents, including submittals, RFIs, punch lists, and change requests, are organized, tracked, and preserved in this cloud-based system. In addition to simple file storage and retrieval, ColbiDocs will preserve every change and comment with easy access and version control.

One of the system's benefits is its ability to customize workflow procedures and logs in the system to meet the project-by-project needs of OUSD. With role-based security, documents are routed to the appropriate persons for processing and approvals. Once a project is ready to be initiated in ColbiDocs, the project team will prepare a draft preconstruction packet for the District's review and approval.

ColbiDocs is required for construction projects with contract value of \$5 million or more. For construction project contracts under \$5 million, the PM/CM/PE should confirm with the executive director of Facilities Planning & Management whether ColbiDocs should be used.

Colbi Technologies will provide training to the construction project team prior to the start of construction.

The following attachments are preconstruction forms for ColbiDocs.



# Pre-con Process Packet

**SAMPLE**

School Name

Project

(Project Name)

All standard construction transmittals, including Submittals, RFIs, Pending Changes, Change Orders, and Inspection Notices will be routed through Colbi Docs. Colbi Docs is a document routing, storage, and retrieval system designed to collect and process all the documents needed to complete a construction contract.

You'll be able to create and process transmittals in Colbi Docs in addition to accessing status logs, reports, and various project files.

► Credentials

These are your credentials to log into Colbi Docs. You will receive a separate packet on how to use Colbi Docs.

Website	<a href="https://facilitiesousd.colbidocs.net">https://facilitiesousd.colbidocs.net</a>
Login	
Password	

Welcome to the Colbi Docs **Pre-con Process Packet!**  
We'll show you how to get things done and share files with your team.

► Project Directory

The following people have been assigned roles and responsibilities for this project:

Project Role	Abbreviation	Icon	Phone	Email
Deputy Chief	DC			
Director	Dir			
Construction Manager	CM			
General Contractor	GC			
Project Admin	Admin			
Project Architect	A/E			
Project Inspector	IOR			
Project Manager	PM			

Contact info is provided for communication about this project and should not be shared for any other purpose.



► Projects & Access Levels

Below is a list of the File Categories typically authorized for your project's management team.

► File Directories

Files in Colbi Docs are not stored in a traditional file tree, but rather are grouped into **File Categories**. File Categories allow files to be organized for search and retrieval. They also control access to Files. A User must have access to the Project and the File Category to access a File.

Uploading a file is explained in the Colbi Docs **User Manual**. When a file is uploaded, it must be assigned to one or more File Categories. If a file is not in a category you have access to, you will not be able to see it. Likewise, if you need to upload a file, you may only upload files to categories you have Edit access to.

File Categories	A/E	GC	IOR	CM	DC	Dir	Admin	PM
Accounting, Expsn Rprts					View	View	Edit	Edit
Agency Submittals	Edit				Edit	Edit	Edit	Edit
As-built Drawings	Edit	Edit	View	View	View	View	View	View
Audit Folder			Edit		View	View	Edit	Edit
Bidding & Proposals					View	View	Edit	Edit
Budget					View	View	Edit	Edit
Construction	View			Edit	View	View	Edit	View
Contracts				View	View	View	Edit	Edit
Correspondence				Edit	Edit	Edit	Edit	Edit
Costal Access	Edit	Edit						
Inspection & Testing	Edit	View	Edit	View	View	View	Edit	Edit
Labo Compliance/DIR				View	View	View	Edit	Edit
Legal					Edit	Edit	Edit	Edit
Meetings	View	View	View	Edit	View	View	Edit	Edit
Photos	View	Edit	Edit	Edit	View	View	Edit	Edit
Planning	Edit				Edit	Edit	Edit	Edit
Prof Sves Selection					Edit	Edit	Edit	Edit
Public Relations				View	Edit	Edit	Edit	Edit
Safety	View	View	View	Edit	View	View	Edit	Edit
Schedules	View	View	View	Edit	Edit	Edit	Edit	Edit
Site Acquisition					Edit	Edit	Edit	Edit
Studies & Reports	View		View	View	Edit	Edit	Edit	Edit
Warranties, M&O Manuals	View	View	View	View	Edit	Edit	Edit	Edit

▶ User Settings

After logging into Colbi Docs, you will find a tab at the top of the page with various options for My Docs, All Docs & Files, and My Settings. Clicking the My Settings tab will open a screen with your basic user information:

- ▶ Name
- ▶ Email
- ▶ Login
- ▶ Project Role

You can change your password on this screen (it's straight forward), but the most useful section is the Email Notification Settings. In this section, you can set the rules for email notifications.

▶ Email Notification Settings

Each category can be set to Active (emails are sent) or Inactive (no email is sent).

- ▶ **New Pending Doc:** a Doc requires action
  - ▶ Unless you check Colbi Docs religiously, it is recommended this always be set to Active.
- ▶ **Doc Moves Forward:** a Doc you've acted on moves forward
- ▶ **Doc Sent Backwards:** a Doc you've acted on is sent backwards
- ▶ **Doc Deleted:** A Doc you've acted on is deleted
- ▶ **Doc Denied:** A Doc you've acted on is denied or closed without being approved
- ▶ **Doc Approved/Closed:** A Doc you've acted on is approved
- ▶ **Doc CC Received:** When a Process calls for your role to be CCed
- ▶ **Comment Added:** When someone comments on a Doc you've acted on

Colbi Docs treats each transmittal as a **Doc**. By default, when it is your turn to act on a Doc (such as responding to an RFP), an email is sent to you to let you know a Doc is pending action. Clicking the link on the email will take you directly to the Doc, where all the information (including comments and supporting files) is waiting for your action.

**Email Notification Settings:**

Choose what events you want to receive notifications from.

- New Pending Doc
- Doc Moves Forward
- Doc Sent Backwards
- Doc Deleted
- Doc Denied
- Doc Approved/Closed
- Doc CC Received
- Comment Added

▶ Required by:



▶ Optional for:



▶ Default Docs

The following pages show key processes and on-line forms illustrate actions based on your role in the project management team. Responsibilities are shown on the appropriate forms, in the appropriate places. Required actions are shown with **blue icons**; optional actions are shown in **green**.

▶ Doc Info

At the top of every Doc is the Doc Info and Doc History, along with a progress bar of the Doc's process and a Next Action Required statement.

Doc: FHS Phz 2A - Pending Change - PC - 003 Print

Review Pending Change for all proper paperwork (Approve/Close, or Send Back)

Next Action Required: **Patrick Alexander (You)** Project Admin  
Review Pending Change for all proper paperwork (Approve/Close, or Send Back)

Doc Info    Doc History

**Transmittal Information:**

Doc #: **PC - 003**    Pending Change Date: **11/12/2017**

Contract Name: Midnight Construction

Description: Someone broke the pool, so now repairs are needed.

Notes: We found a golf cart in the pool. the golf cart is a full loss, but we need to do some plaster repairs work and reseal. Good thing there wasn't water in it. I bet the vandals were surprised to find it.

Tags: Separate Tags Using A Comma  
[Show Suggested Tags](#)

▶ Required by:



Originator

▶ Optional for:



Originator

**Descriptions** should be informative descriptions. This will be the only line that makes it into most reports. "Pending Change Required" will be less informative than "Modified Sprinkler Heads Throughout."

- ▶ **Doc #:** populates automatically, but can be overridden by those with permission
- ▶ **Date:** populates automatically, but can be overridden by those with permission
- ▶ **Contract Name:** populates automatically for construction contracts
- ▶ **Description:** is required for the Doc originator; in some cases, such as RFIs and Inspection Notices, it is the best summary of the issue addressed by the Doc
- ▶ **Notes:** are useful for providing more information about the Doc
- ▶ **Tags:** allow Colbi Docs to sort and filter Docs and Files for easy retrieval

▶ Submittals

The Submittal process is for the Contractor to submit materials to be used in construction for the Architect to review and approve. Colbi Docs handles the paperwork part of submittals only — sometimes, there will be physical samples that need to be reviewed.

The top of the Submittal form is filled in by the Contractor with information about materials to be submitted. They should enter a **Description**, **Drawing Reference** and **Specifications Reference**.

If the approval is **Time Critical**, check the box, then enter a **Required by Date** (along with a **Justification** as to why). If the materials are stored as **Separate Materials**, check the box, then enter the **Location of Separate Materials** for physical examples.

The Architect should check the appropriate box for **No Exception Taken**, **Reviewed for Information Only**, **Rejected**, **Revise and Resubmit as Noted**, and **Implement Correction Noted**. There is a box for said **Notes**. If approved, the **Date Approved** should be entered.

### Submittal

Originated by Contractor regarding materials/items to be used in Project, reviewed by Architect

Drawing Ref: A-023 3.b

Spec Ref: Div 04: 7.1(b)

Time Critical:

Separate Materials:

Location of Separate Materials: We built it just North of our material lay-down

Date Approved:

No Exception Taken:

Reviewed for Information Only:

Rejected:

Revise and Resubmit as Noted:

Implement Correction Noted:

Notes:

Submittals

- General Contractor**  
 Begins the submittal process
- 
- Construction Manager**  
 Confirms contract compliance
- 
- Project Architect**  
 Reviews for compliance with design specifications
- 
- Construction Manager**  
 Confirms architect review
- 
- General Contractor**  
 Acknowledges receipt of approved submittal
-

▶ Request for Information

The Request for Information (RFI) is intended to provide the Contractor a means to ask questions and get clarification from the Architect in order to build the project correctly.

The Request for Information works simply. The Contractor fills out the **Question**, with **Drawing** and **Specification References** if appropriate.

If the answer is **Time Critical**, check the box, then enter a **Required by Date** (along with a **Justification** as to why).

The Architect fills in the **Answer** and selects if a **CO** or **As-Built** is **Required**.

**RFI**  
Request for Information (RFI) form: originated by Contractor, answered by Architect

**Question:** What is required elevation of top of Bldg 100 foundation?

**Drawing Ref:** C-02, and A-03

**Spec Ref:** n/s

**Time Critical:**

**Answer:**

**CO Required:**

**As-Built Required:**



Request for Information (RFI)



▶ Pending Change

The Pending Change (PC) process tracks the Owner's Request for Proposals (RFPs) and the Contractor's Request for Pending Change. A PC documents the impact of a change in work, cost, and/or schedule.

The Pending Change form provides for a **Description** of the change, the Contractor's **Proposed Amount** and **Proposed Time** change. The Contractor should attach a detailed breakdown of material, labor, equipment, overhead, and profit as a **Supporting File**.

If the answer is **Time Critical**, check the box, then enter a **Required by Date** (along with a **Justification** as to why).

If the Pending Change is an Allowance Draw, Select the **Is an Allowance Draw?** check box, then select the appropriate Allowance.

The Project Manager should fill out the **Approved Amount**, **Approved Time**, and whether there is a **Notice to Proceed**. Select **Time Critical** for a **Required By Date**. Provide a **Justification**.

### Pending Change

Contractor proposed cost & time for changed work and agreement/resolution of cost & time required. May be originated by Owner (request for proposal) or by Contractor (pending change request).

Per Contract General Conditions, Contractor shall not proceed with changed work without prior written authorization.

Proposed Amount: \$ 72,121.00

Proposed Time: 7 days

Time Critical:

Required By: 8/31/2019

Justification: Foundations - critical path

Attach supporting files including detailed breakdown of material, labor, equipment, overhead, and profit for each trade.

Is an Allowance Draw?

Cause: (Select One)

Approved Amount: \$ 0

Approved Time: days

Issue Notice to Proceed (NTP):

Unilateral Change:

DSA Deviation:



► Change Order

After the scope, cost, and time of one or more Pending Changes has been agreed to by owner and contractor, it needs to be formally incorporated into the contract via Change Order. Multiple pending changes can be combined into one change order.

Change Orders are filled out by the Construction Manager and Project Manager.

Select the available **Pending Changes** and **Allowances** from the bottom of the form to include in the Change Order. **Any Allowances selected will be closed out.** **Change Amounts** will populate automatically.

The Project Admin should enter the **Board Approval Date** and finalize the Change Order.

If the **Contains Unilateral PCs** is checked, this flags the Pending Change as one approved for construction, without acceptance by the Contractor.

**Unilateral changes are rare and avoided as they may result in litigation.**

### Change Order

Originated by Owner, documents addition of changed work to the contract, or deletion of work from the contract.

Contract NTP Date: 8/25/2020

Original Contract Amount: \$ 30,200,000.00

Change by previous COs: 730 days

Change by this CO: 14 days

Change by this CO: \$ 0

New Total Contract Amount: \$30,209,300.00

New Contract Completion Date: 7/8/2022

Board Approval Date:

Contains Unilateral PCs:

This Change Order includes the following changes to the Contract scope of work.

PC ID	Description	Change Amount	Days	NTP Date	
(No Pending Change Docs have been linked to this Change Order)					
Allow ID	Description	Contract	Change Amount	Days	% to Owner
Allow 01	Owner Contingency	App Construction	\$-938,912.65	0	100
<b>Allowance Change Amount:</b>			<b>\$-938,912.65</b>	<b>0</b>	

### Change Order

- Cons Mgr, Proj Mgr, Dir, or Proj Admin**  
 Begins Change Order process
- Project Manager**  
 Reviews Change Order paperwork
- N/A
- General Contractor**  
 Accepts and signs Change Order
- Project Architect**  
 Accepts and signs Change Order
- Director**  
 Signs Change Order after Board Approval
- N/A
- Deputy Chief**  
 Signs Change Order after Board Approval
- Project Manager**  
 Prepares Change Order for Board
- Project Admin**  
 Prepares Change Order after Board approval – Approves or returns

▶ **Inspection Deficiency Notice**

An Inspection Deficiency Notice is written in direction from the Project Inspector that work completed incorrectly must be corrected.

The Project Inspector should fill out the top of the form, noting a **Description of Deficiencies**, **Drawing Reference**, and **Specifications Reference**.

The **Description** should clearly define the deficiency that must be corrected, use the **Notes** field if needed.

If the correction is **Time Critical**, toggle the switch, then enter the **Required By Date** along with a **Justification**.

Deficiencies that require DSA involvement should be marked for special handling by selecting **DSA Deviation**.

After the deficiency is corrected (and the Doc routed back to the Project Inspector), it should be noted in the field **Correction Verified**.

### Inspection Notice

Originated by Inspector, notifies Contractor of a construction deficiency that must be corrected and documents correction of that deficiency.

You are notified to rectify the described deficiencies to satisfaction of the Project Inspector of Records (IoR)

Drawing Ref:

Spec Ref:

Time Critical:

DSA Deviation:

Failure to comply as requested gives the district the right to enforce specific provisions of your contract allowing the district to remedy deficiencies through the district workforce or other contractors and deducting costs for such from your contract.

Correction Verified:



### Inspection Notice

- Q
**Project Inspector**  
 Document the construction deficiency
 

CC
Print
Clipboard
Hard Hat
- W
**General Contractor**  
 Corrects the construction deficiency
 

CC
N/A
- Q
**Project Inspector**  
 Verifies the deficiency has been corrected
 

CC
Print
Wrench
Hard Hat

▶ In Conclusion

We hope you found this Pre-con Process Packet useful and informative. As always, help is only a phone call away. The easiest way to get our attention is by sending an email to [cdsupport@colbitech.com](mailto:cdsupport@colbitech.com).

We are always looking for ways to improve Colbi Docs and its features. If you think of a way to improve the program, please drop us a line.

▶ Support

- ▶ Time  
**Monday – Friday**  
**9 AM – 5 PM**
- ▶ Phone:  
**(714) 505-9544**
- ▶ Email:  
[cdsupport@colbitech.com](mailto:cdsupport@colbitech.com)

A **User Manual** is available at the Colbi Docs website.



## 5.11 | Change Management

Change orders record and authorize changes in the contract scope, amount, or duration. The CM is responsible for ensuring that the administration of changes in the work follows the prescribed contract provisions.

### **Proposed Change Orders:**

A proposed change order (PCO) is a written request that the contractor prepares to request that the District issue a change order (CO) based upon a proposed change to the work, and in any situation where the contractor believes a change in the work has occurred. Every PCO that the District approves will become part of a CO.

The contractor provides the PCO on District-approved forms and includes backup documentation to support any additions, deletions, time extensions, or revisions in the work, including a detailed cost breakdown validating a proposed adjustment to the contract amount. The contractor submits drawings and specifications as necessary to illustrate the reasoning for a PCO.

### **Change Reason Code:**

Every PCO must include the reason for the change. There are four different reason codes.

- *Unforeseen condition* that could not have been reasonably known or investigated without destructive testing.
- *Owner-initiated request*.
- *DSA or Agency Having Jurisdiction* that requests a modification to the project.
- Design deficiencies resulting from *Errors* by the design team.
- Design deficiencies resulting from *Omissions* by the design team.

### **Allowance Expenditure Directives - Construction Services (No BOE Approval Required):**

1. The contractor submits a PCO with scope, cost, hourly rates, and schedule impacts within 5 working days of encountering changed conditions.
2. The PM/CM/PE and AOR confirm entitlement.
3. The District's estimator develops estimates for PCOs in excess of a \$5,000.
4. The PM/CM/PE negotiates costs, if necessary.
5. The PM/CM/PE issues AED (use the AED District Standard AED form).
6. Approval is required from the executive director of Facilities Planning & Management and deputy chief of Facilities Planning & Management.
7. Once all approvals are received, the contractor proceeds with the work.

### **Change Order Process:**

The PM/CM/PE and the contractor meet to review the PCO. Once the contractor and PM/CM reach an agreement on proposed changes to the contract's cost or time, the PM/CM/PE prepares a CO package for District review and approval. PCOs and COs missing adequate backup documentation will not be processed.

- Change order packages include the following documentation:
  1. Change order approval form (signatory page)
  2. Proposed change order approval form (PCO) with signatures
  3. Cost proposals from the contractor
  4. Cost estimate review and sign off by the District's cost estimator for all costs over \$5,000
  5. Request for information (if any)
  
- Board Approval is required if the CO amount exceeds 10% of contract value but all COs needs to be ratified by the Board.
  
- The contacts and bid specialist submits COs to the BOE for approval. Once approval is received, the CM is responsible for notifying the contractor and distributing the approved CO documents to the project team. Once the Board approves the CO, contractor may include the CO in their next payment application.

**Unilateral Change Order:**

The District may issue a unilateral change order in the absence of agreement on the terms of a change order. If there is partial agreement on a PCO, the CM may issue a CO for those portions of the PCO upon which the contractor and the CM have mutually agreed. The resolution of any dispute about the sum of the unilateral change order or timing of payment follows the contractual payment provisions and the claims and dispute resolution process.

**Professional Services (additional services less than 10% of the contract value):**

1. After encountering a changed condition, the vendor submits an additional services request with scope, cost, and schedule impacts described.
2. The PM/CM/PE confirms entitlement.
3. The PM/CM negotiate costs.
4. Approval is required from the executive director of Facilities Planning & Management.
5. The vendor proceeds with the work.
6. BOE approval may be necessary depending on the scope of work. (The executive will identify when this is required.)

**Change Order / Additional Services in Excess of 10% of the Contract Value:**

1. After encountering a changed condition, the vendor submits a potential change order (PCO) or additional services request with scope, cost, and schedule impacts described. PCOs should be inclusive of RFIs, ASIs, bulletins, and/or addendums.
2. The PM/CM confirms entitlement.
3. The District's estimator develops estimates for PCOs in excess of a \$5,000.
4. The PM/CM negotiates costs.
5. The PM/CM/PE issues the change order.
6. The PM/CM/PE submits the change order to OUSD legal counsel.
7. The PM/CM/PE logs the change request.
8. OUSD legal counsel reviews and returns comments to the PM/CM/PE to prepare change orders.

9. Approval is required from the executive director of Facilities Planning & Management.
10. Approval is required from the deputy chief of Facilities Planning & Management.
11. The contracts and bids specialist prepares BOE transmittal.
12. The BOE approves the COs.
13. Once approvals are finalized, the contractor proceeds with the work.

If a change order exceeds 50% of the contract value, a new contract is required.

See PCO, AEDs, CO templates attached

DRAFT

# ALLOWANCE EXPENDITURE DIRECTIVE No. \_\_\_\_

**PROJECT:** \_\_\_\_\_ Project  
 \_\_\_\_\_ School

**DATE:** \_\_\_\_\_, 20\_\_

**DSA FILE NO.:** \_\_\_\_-\_\_\_\_

**DSA APP NO.:** \_\_\_\_-\_\_\_\_

**OWNER:** OAKLAND UNIFIED SCHOOL DISTRICT

**OUSD PROJECT #:** \_\_\_\_\_

**CONTRACTOR:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_, CA \_\_\_\_\_

**PROJECT MANAGER:** \_\_\_\_\_

If not previously directed, the Contractor is hereby directed to perform the Work described in this allowance expenditure directive and its attachments, including but not limited to the Summary, the relevant CORs or PCOs, and the backup documentation for the CORs or PCOs. **Any request for a time extension for such work must be separately processed** via contract procedures and a change order.

DESCRIPTION OF AGREED CHANGES IN WORK (specifically refer to attached pages or incorporated documents, such as CORs or PCOs, or include a detailed description of the changes):

\_\_\_\_\_  
 \_\_\_\_\_

AGREED ALLOWANCE EXPENDITURE FOR THIS WORK: \$ \_\_\_\_\_

**SUMMARY OF ADJUSTMENTS TO ALLOWANCE:**

Original Amount of Allowance:	
\$ _____	
Board-Approved Changes to Allowance:	\$ _____
Previous Allowance Expenditure Directives:	\$ _____
This Allowance Expenditure Directive:	\$ _____
Remaining Amount of Allowance:	\$ _____

THE COMPENSATION SET FORTH IN THIS DIRECTIVE COMPRISES THE TOTAL COMPENSATION DUE THE CONTRACTOR UPON COMPLETION OF THE WORK DESCRIBED, INCLUDING EXTRA WORK, AND IMPACT ON UNCHANGED WORK. ACCEPTANCE BY CONTRACTOR OF THIS DIRECTIVE CONSTITUTES A FULL AND COMPLETE ACCORD AND SATISFACTION OF ANY AND ALL CLAIMS BY CONTRACTOR ARISING OUT OF OR RELATING TO THE WORK AND ISSUES COVERED BY THE DIRECTIVE, INCLUDING BUT NOT LIMITED TO CLAIMS FOR CONTRACT BALANCE AND RETENTION, EXTENDED FIELD, HOME OFFICE OR OTHER OVERHEAD, ALL ACCELERATION, IMPACT, DISRUPTION AND DELAY DAMAGES, ANY AND ALL OTHER DIRECT AND/OR INDIRECT COSTS, CLAIMS BY SUBCONTRACTORS AND SUPPLIERS, AND ANY AND ALL OTHER CLAIMS AGAINST THE OWNER FOR MONEY, FROM ANY SOURCE AND UNDER ANY LEGAL THEORY WHATSOEVER, AS TO THE SUBJECT OF THIS DIRECTIVE. NO SIGNATURE UNDER PROTEST OR ACCOMPANIED BY RESERVATION OF RIGHTS OR PROTEST LANGUAGE, OR ANY OTHER ATTEMPTS TO AVOID SUCH WAIVER SHALL BE OF ANY FORCE OR EFFECT WHATSOEVER. NO ADDITIONS OR DELETIONS TO THIS DIRECTIVE SHALL BE ALLOWED, EXCEPT WITH WRITTEN PERMISSION OF OWNER. NO LANGUAGE CONTAINED IN BACKUP MATERIAL TO THIS DIRECTIVE SHALL CONSTITUTE A WAIVER OF THIS REQUIREMENT, AND SUCH BACKUP MATERIAL SHALL BE INTERPRETED AS THOUGH SUCH LANGUAGE DOES NOT EXIST.

AS TO THE SCOPE OF THIS DIRECTIVE, CONTRACTOR EXPRESSLY UNDERSTANDS AND AGREES TO WAIVE THE PROVISIONS OF, AND ALL RIGHTS AND BENEFITS AFFORDED BY, CALIFORNIA CIVIL CODE SECTION 1542, WHICH PROVIDES IN FULL AS FOLLOWS:

**A GENERAL RELEASE DOES NOT EXTEND TO CLAIMS THAT THE CREDITOR OR RELEASING PARTY DOES NOT KNOW OR SUSPECT TO EXIST IN HIS OR HER FAVOR AT THE TIME OF EXECUTING THE RELEASE, AND THAT, IF KNOWN BY HIM OR HER, WOULD HAVE MATERIALLY AFFECTED HIS OR HER SETTLEMENT WITH THE DEBTOR OR RELEASED PARTY.**

This Allowance Expenditure Directive is hereby agreed to, accepted, and approved by the Parties, and will be binding and enforceable.

<p><b>Reviewed by:</b> _____</p> <p><b>Project Manager</b></p> <p><b>Date:</b></p>	<p><b>Approved and Agreed:</b> <b>General Contractor</b> _____</p> <p><b>Date:</b></p>	<p><b>Approved and Agreed:</b> _____</p> <p><b>Director of Facilities</b></p> <p><b>Date:</b></p>
<p><b>Approved:</b> <b>Architect of Record</b> _____</p> <p><b>Date:</b></p>		<p>_____</p> <p><b>Deputy Chief, Facilities</b></p> <p><b>Date:</b></p>

**ALLOWANCE EXPENDITURE DIRECTIVE No. \_\_\_\_**

**For the \_\_\_\_\_ [insert name of allowance] ALLOWANCE**

Lease-Leaseback Lump-Sum Contract

**PROJECT:** \_\_\_\_\_ Project  
\_\_\_\_\_ School

**DATE:** \_\_\_\_\_, 20\_\_

**OWNER:** OAKLAND UNIFIED SCHOOL DISTRICT

**DSA FILE NO.:** \_\_\_\_-\_\_\_\_\_

**DSA APP NO.:** \_\_\_\_-\_\_\_\_\_

**CONTRACTOR:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_, CA 9\_\_\_\_\_

**OUSD PROJECT #:** \_\_\_\_\_

**PROJECT MANAGER:** \_\_\_\_\_

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DESCRIPTION OF AGREED CHANGES IN LLB WORK (specifically refer to attached pages or incorporated documents, such as CORs or PCOs, or include a detailed description of the changes):

\_\_\_\_\_  
\_\_\_\_\_

AGREED ALLOWANCE EXPENDITURE FOR THIS LLB WORK: \$ \_\_\_\_\_

**SUMMARY OF ADJUSTMENTS TO LLB ALLOWANCE:**

Original Amount of Allowance:	
\$ _____	
Board-Approved Changes to Allowance:	\$ _____
Previous Allowance Expenditure Directives:	\$ _____
This Allowance Expenditure Directive:	\$ _____
Remaining Amount of Allowance:	\$ _____

THE COMPENSATION SET FORTH IN THIS DIRECTIVE COMPRISES THE TOTAL COMPENSATION DUE THE CONTRACTOR UPON COMPLETION OF THE WORK DESCRIBED, INCLUDING EXTRA WORK, AND IMPACT ON UNCHANGED WORK. ACCEPTANCE BY CONTRACTOR OF THIS DIRECTIVE CONSTITUTES A FULL AND COMPLETE ACCORD AND SATISFACTION OF ANY AND ALL CLAIMS BY CONTRACTOR ARISING OUT OF OR RELATING TO THE WORK AND ISSUES COVERED BY THE DIRECTIVE, INCLUDING BUT NOT LIMITED TO CLAIMS FOR CONTRACT BALANCE AND RETENTION, EXTENDED FIELD, HOME OFFICE OR OTHER OVERHEAD, ALL ACCELERATION, IMPACT, DISRUPTION AND DELAY DAMAGES, ANY AND ALL OTHER DIRECT AND/OR INDIRECT COSTS, CLAIMS BY SUBCONTRACTORS AND SUPPLIERS, AND ANY AND ALL OTHER CLAIMS AGAINST THE OWNER FOR MONEY, FROM ANY SOURCE AND UNDER ANY LEGAL THEORY WHATSOEVER, AS TO THE SUBJECT OF THIS DIRECTIVE. NO SIGNATURE UNDER PROTEST OR ACCOMPANIED BY RESERVATION OF RIGHTS OR PROTEST LANGUAGE, OR ANY OTHER ATTEMPTS TO AVOID SUCH WAIVER SHALL BE OF ANY FORCE OR EFFECT WHATSOEVER. NO ADDITIONS OR DELETIONS TO THIS DIRECTIVE SHALL BE ALLOWED, EXCEPT WITH WRITTEN PERMISSION OF OWNER. NO LANGUAGE CONTAINED IN BACKUP MATERIAL TO THIS DIRECTIVE SHALL CONSTITUTE A WAIVER OF THIS REQUIREMENT, AND SUCH BACKUP MATERIAL SHALL BE INTERPRETED AS THOUGH SUCH LANGUAGE DOES NOT EXIST.

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<b>Reviewed by:</b> <hr/> <b>Project Manager</b> <b>Date:</b>	<b>Approved and Agreed:</b> <b>General Contractor</b> <hr/> <b>Date:</b>	<b>Approved and Agreed:</b> <hr/> <b>Director of Facilities</b> <b>Date:</b>
<b>Approved:</b> <b>Architect of Record</b> <hr/> <b>Date:</b>		<hr/> <b>Deputy Chief, Facilities</b> <b>Date:</b>

**ALLOWANCE EXPENDITURE DIRECTIVE NO. \_\_\_\_**

**For the \_\_\_\_\_ [insert name of allowance] ALLOWANCE**

**Design-Bid-Build Contract**

**PROJECT:** \_\_\_\_\_ Project  
\_\_\_\_\_ School

**DATE:** \_\_\_\_\_, 20\_\_

**DSA FILE NO.:** \_\_\_\_-\_\_\_\_\_

**DSA APP NO.:** \_\_\_\_-\_\_\_\_\_

**OWNER:** OAKLAND UNIFIED SCHOOL DISTRICT

**OUSD PROJECT #:** \_\_\_\_\_

**CONTRACTOR:** \_\_\_\_\_

**PROJECT MANAGER:** \_\_\_\_\_

If not previously directed, the Contractor is hereby directed to perform the Work described in this allowance expenditure directive and its attachments, including but not limited to the Summary, the relevant CORs or PCOs, and the backup documentation for the CORs or PCOs. **Any request for a time extension for such work must be separately processed** via contract procedures and a change order.

DESCRIPTION OF AGREED CHANGES IN WORK (specifically refer to attached pages or incorporated documents, such as CORs or PCOs, or include a detailed description of the changes):

\_\_\_\_\_

AGREED ALLOWANCE EXPENDITURE FOR THIS WORK: \$ \_\_\_\_\_

**SUMMARY OF ADJUSTMENTS TO ALLOWANCE:**

Original Amount of Allowance:

\$ \_\_\_\_\_

Board-Approved Changes to Allowance:

\$ \_\_\_\_\_

Previous Allowance Expenditure Directives:

\$ \_\_\_\_\_

This Allowance Expenditure Directive:

\$ \_\_\_\_\_

Remaining Amount of Allowance:

\$ \_\_\_\_\_

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This Allowance Expenditure Directive is hereby agreed to, accepted, and approved by the Parties, and will be binding and enforceable.

<p>Reviewed:</p> <p>_____</p> <p>Project Manager</p> <p>Date:</p> <p>Approved:</p> <p>Architect of Record</p> <p>_____</p> <p>Date:</p>	<p>Approved and Agreed:</p> <p>General Contractor</p> <p>_____</p> <p>Date:</p>	<p>Approved and Agreed:</p> <p>_____</p> <p>Director of Facilities</p> <p>Date:</p> <p>_____</p> <p>Deputy Chief of Facilities</p> <p>Date:</p>
<p>Approved: Electrical or Structural Engineer</p> <p>_____</p> <p>Date:</p>	<p>Approved: Mechanical Engineer</p> <p>_____</p> <p>Date:</p>	<p>Approved: Div. of the State Architect</p> <p>Date:</p>

**CHANGE ORDER No. \_\_\_\_\_**

**Design-Bid-Build Contract**

**PROJECT:** \_\_\_\_\_ Project  
\_\_\_\_\_ School

**DATE:** \_\_\_\_\_, 20\_\_

**OWNER:** OAKLAND UNIFIED SCHOOL DISTRICT

**DSA FILE NO.:** \_\_\_\_-\_\_\_\_

**CONTRACTOR:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_, CA 9\_\_\_\_\_

**DSA APP NO.:** \_\_\_\_-\_\_\_\_

**OUSD PROJECT #:** \_\_\_\_\_

**PROJECT MANAGER:** \_\_\_\_\_

If not previously directed, the Contractor is hereby directed to perform the Work described in this change order and its attachments, including but not limited to the Summary, the relevant CORs or PCOs, and the backup documentation for the CORs or PCOs.

DESCRIPTION OF AGREED CHANGES IN WORK (specifically refer to attached pages or incorporated documents, such as CORs or PCOs):

\_\_\_\_\_

\_\_\_\_\_

OTHER AGREED CHANGES TO THE CONTRACT: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

AGREED ADJUSTMENT TO CONTRACT PRICE IN THIS CHANGE ORDER: \$ \_\_\_\_\_

AGREED ADJUSTMENT TO CONTRACT TIME IN THIS CHANGE ORDER: \_\_\_\_\_ calendar days

AGREED ADJUSTMENT TO TIME FOR THE \_\_\_\_\_ MILESTONE DEADLINE IN THIS CHANGE ORDER: \_\_\_\_\_ calendar days

**SUMMARY OF ADJUSTMENTS TO CONTRACT PRICE:**

Original Contract Price (including all specific allowances and any general contingency allowance):		\$	_____
Total of Prior Change Orders' Adjustments:	+	\$	_____
Total Contract Price Prior to this Change Order:	=	\$	_____
This Change Order's Adjustment:		+	_____
\$ _____			
New Contract Price (including all allowances):	=	\$	_____

Current Change Order's Percentage of Original Contract Price: \_\_\_\_\_%

Total Change Orders' Percentage of Original Contract Price: \_\_\_\_\_%

**NOTE:** Any unspent allowance amounts (including any general contingency allowance) shall be retained by the Owner at the end of the Contract. To process an allowance expenditure, use the Allowance Expenditure Directive form, which requires signatures of Contractor and Owner, but does not require Board approval.

SUMMARY OF ADJUSTMENTS TO CONTRACT TIME FOR COMPLETION:

Original Contract Time:  
\_\_\_\_\_ Calendar Days  
Time extensions granted in prior change orders: + \_\_\_\_\_ Calendar Days  
Time extension granted in this change order: + \_\_\_\_\_ Calendar Days  
Adjusted Contract Time: =  
\_\_\_\_\_ Calendar Days

Start date per Notice to Proceed:  
\_\_\_\_\_, 20\_\_  
Completion Deadline Based on Adjusted Contract Time: \_\_\_\_\_, 20\_\_

SUMMARY OF ADJUSTMENTS TO TIME FOR THE \_\_\_\_\_ MILESTONE DEADLINE:

**[NOTE TO OWNER: If there is no milestone deadline in the agreement, then delete these lines about milestone deadline adjustments. If there are two or more milestone deadlines in the agreement, then repeat these lines for each milestone deadline. If the time extension granted by this change order applies only to the completion deadline (above), then do not include it in these lines about the milestone deadline.]**

Original time for milestone deadline:  
\_\_\_\_\_ Calendar Days  
Prior change order adjustments to time for milestone deadline: + \_\_\_\_\_ Calendar Days  
This change order's adjustment to time for milestone deadline: + \_\_\_\_\_ Calendar Days  
Adjusted time for milestone deadline: =  
\_\_\_\_\_ Calendar Days

Start date per Notice to Proceed:  
\_\_\_\_\_, 20\_\_  
Milestone Deadline Based on Adjusted Time: \_\_\_\_\_, 20\_\_

THE COMPENSATION (TIME AND COST) SET FORTH IN THIS CHANGE ORDER COMPRISES THE TOTAL COMPENSATION DUE THE CONTRACTOR FOR THE CHANGE DEFINED IN THE CHANGE ORDER, INCLUDING EXTRA WORK AND IMPACT ON UNCHANGED WORK. ACCEPTANCE OF THIS CHANGE ORDER CONSTITUTES A FULL AND COMPLETE ACCORD AND SATISFACTION OF ANY AND ALL CLAIMS BY CONTRACTOR ARISING OUT OF OR RELATING TO THE WORK AND ISSUES COVERED BY THE CHANGE ORDER, INCLUDING BUT NOT LIMITED TO CLAIMS FOR CONTRACT BALANCE AND RETENTION, TIME, EXTENDED FIELD, HOME OFFICE OR OTHER OVERHEAD, ALL ACCELERATION, IMPACT, DISRUPTION AND DELAY DAMAGES, ANY AND ALL OTHER DIRECT AND/OR INDIRECT COSTS, CLAIMS BY SUBCONTRACTORS AND SUPPLIERS, AND ANY AND ALL OTHER CLAIMS AGAINST THE OWNER FOR TIME OR MONEY, FROM ANY SOURCE AND UNDER ANY LEGAL THEORY WHATSOEVER, AS TO THE SUBJECT OF THIS CHANGE ORDER. NO SIGNATURE UNDER PROTEST OR ACCOMPANIED BY RESERVATION OF RIGHTS OR PROTEST LANGUAGE, OR ANY OTHER ATTEMPTS TO AVOID SUCH WAIVER SHALL BE OF ANY FORCE OR EFFECT WHATSOEVER. NO ADDITIONS OR DELETIONS TO THIS CHANGE ORDER SHALL BE ALLOWED, EXCEPT WITH WRITTEN PERMISSION OF OWNER. NO LANGUAGE CONTAINED IN BACKUP MATERIAL TO ANY CHANGE ORDER SHALL CONSTITUTE A WAIVER OF THIS REQUIREMENT, AND SUCH BACKUP MATERIAL SHALL BE INTERPRETED AS THOUGH SUCH LANGUAGE DOES NOT EXIST.

AS TO THE SCOPE OF THIS CHANGE ORDER, CONTRACTOR EXPRESSLY UNDERSTANDS AND AGREES TO WAIVE THE PROVISIONS OF, AND ALL RIGHTS AND BENEFITS AFFORDED BY, CALIFORNIA CIVIL CODE SECTION 1542, WHICH PROVIDES IN FULL AS FOLLOWS:

**A GENERAL RELEASE DOES NOT EXTEND TO CLAIMS THAT THE CREDITOR OR RELEASING PARTY DOES NOT KNOW OR SUSPECT TO EXIST IN HIS OR HER FAVOR AT THE TIME OF EXECUTING THE RELEASE, AND THAT, IF KNOWN BY HIM OR HER, WOULD HAVE MATERIALLY AFFECTED HIS OR HER SETTLEMENT WITH THE DEBTOR OR RELEASED PARTY.**

This Change Order is hereby agreed to, accepted, and approved, and will be binding and enforceable upon approval by the Owner's governing body.

**Approved as to Form:**

\_\_\_\_\_  
 OUSD Facilities Counsel

\_\_\_\_\_  
 Date

Approved: Architect of Record _____	Approved and Agreed: General Contractor _____	Approved and Agreed: _____
Date:	Date:	Director of Facilities Date:
		_____ Deputy Chief of Facilities Date:

\_\_\_\_\_  
 Shanthy Gonzales, President  
 Board of Education

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Kyla Johnson-Trammell, Secretary  
 Superintendent, Board of Education

\_\_\_\_\_  
 Date

**CHANGE ORDER No. \_\_\_\_**

Lease-Leaseback Lump-Sum Contract

**PROJECT:** \_\_\_\_\_ Project  
\_\_\_\_\_ School

**DATE:** \_\_\_\_\_, 20\_\_

**OWNER:** OAKLAND UNIFIED SCHOOL DISTRICT

**DSA FILE NO.:** \_\_\_\_-\_\_\_\_

**CONTRACTOR:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_, CA 9\_\_\_\_\_

**DSA APP NO.:** \_\_\_\_-\_\_\_\_

**OUSD PROJECT #:** \_\_\_\_\_

**PROJECT MANAGER:** \_\_\_\_\_

If not previously directed, the Contractor is hereby directed to perform the Work described in this change order and its attachments, including but not limited to the Summary, the relevant CORs or PCOs, and the backup documentation for the CORs or PCOs.

DESCRIPTION OF AGREED CHANGES IN LLB WORK (specifically refer to attached pages or incorporated documents, such as CORs or PCOs):

\_\_\_\_\_

\_\_\_\_\_

OTHER AGREED CHANGES TO THE LLB CONTRACT: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

AGREED ADJUSTMENT TO LLB CONTRACT PRICE IN THIS CHANGE ORDER: \$ \_\_\_\_\_

AGREED ADJUSTMENT TO LLB CONTRACT TIME IN THIS CHANGE ORDER: \_\_\_\_\_ calendar days

AGREED ADJUSTMENT TO LLB TIME FOR THE \_\_\_\_\_ MILESTONE DEADLINE IN THIS CHANGE ORDER: \_\_\_\_\_ calendar days

**SUMMARY OF ADJUSTMENTS TO LLB CONTRACT PRICE:**

Original Contract Price (including all specific allowances and any general contingency allowance):		\$	_____
Total of Prior Change Orders' Adjustments:	+	\$	_____
Total Contract Price Prior to this Change Order:	=	\$	_____
This Change Order's Adjustment:		+	_____
\$ _____			
New Contract Price (including all allowances):	=	\$	_____

Current Change Order's Percentage of Original Contract Price: \_\_\_\_\_ %  
Total Change Orders' Percentage of Original Contract Price: \_\_\_\_\_ %

**NOTE:** Any unspent allowance amounts (including any general contingency allowance) shall be retained by the Owner at the end of the Contract. To process an allowance expenditure, use the Allowance Expenditure Directive form, which requires signatures of Contractor and Owner, but does not require Board approval.

SUMMARY OF ADJUSTMENTS TO LLB CONTRACT TIME FOR COMPLETION:

Original Contract Time: \_\_\_\_\_ Calendar Days  
Time extensions granted in prior change orders: + \_\_\_\_\_ Calendar Days  
Time extension granted in this change order: + \_\_\_\_\_ Calendar Days  
Adjusted Contract Time: \_\_\_\_\_ =  
\_\_\_\_\_ Calendar Days

Start date per Notice to Proceed: \_\_\_\_\_, 20\_\_  
Completion Deadline Based on Adjusted Contract Time: \_\_\_\_\_, 20\_\_

SUMMARY OF ADJUSTMENTS TO LLB TIME FOR THE \_\_\_\_\_ MILESTONE DEADLINE:

***[NOTE TO OWNER: If there is no milestone deadline in the agreement, then delete these lines about milestone deadline adjustments. If there are two or more milestone deadlines in the agreement, then repeat these lines for each milestone deadline. If the time extension granted by this change order applies only to the completion deadline (above), then do not include it in these lines about the milestone deadline.]***

Original time for milestone deadline: \_\_\_\_\_ Calendar Days  
Prior change order adjustments to time for milestone deadline: + \_\_\_\_\_ Calendar Days  
This change order's adjustment to time for milestone deadline: + \_\_\_\_\_ Calendar Days  
Adjusted time for milestone deadline: \_\_\_\_\_ =  
\_\_\_\_\_ Calendar Days

Start date per Notice to Proceed: \_\_\_\_\_, 20\_\_  
Milestone Deadline Based on Adjusted Time: \_\_\_\_\_, 20\_\_

THE COMPENSATION (TIME AND COST) SET FORTH IN THIS CHANGE ORDER COMPRISES THE TOTAL COMPENSATION DUE THE CONTRACTOR FOR THE CHANGE DEFINED IN THE CHANGE ORDER, INCLUDING EXTRA WORK AND IMPACT ON UNCHANGED WORK. ACCEPTANCE OF THIS CHANGE ORDER CONSTITUTES A FULL AND COMPLETE ACCORD AND SATISFACTION OF ANY AND ALL CLAIMS BY CONTRACTOR ARISING OUT OF OR RELATING TO THE WORK AND ISSUES COVERED BY THE CHANGE ORDER, INCLUDING BUT NOT LIMITED TO CLAIMS FOR CONTRACT BALANCE AND RETENTION, TIME, EXTENDED FIELD, HOME OFFICE OR OTHER OVERHEAD, ALL ACCELERATION, IMPACT, DISRUPTION AND DELAY DAMAGES, ANY AND ALL OTHER DIRECT AND/OR INDIRECT COSTS, CLAIMS BY SUBCONTRACTORS AND SUPPLIERS, AND ANY AND ALL OTHER CLAIMS AGAINST THE OWNER FOR TIME OR MONEY, FROM ANY SOURCE AND UNDER ANY LEGAL THEORY WHATSOEVER, AS TO THE SUBJECT OF THIS CHANGE ORDER. NO SIGNATURE UNDER PROTEST OR ACCOMPANIED BY RESERVATION OF RIGHTS OR PROTEST LANGUAGE, OR ANY OTHER ATTEMPTS TO AVOID SUCH WAIVER SHALL BE OF ANY FORCE OR EFFECT WHATSOEVER. NO ADDITIONS OR DELETIONS TO THIS CHANGE ORDER SHALL BE ALLOWED, EXCEPT WITH WRITTEN PERMISSION OF OWNER. NO LANGUAGE CONTAINED IN BACKUP MATERIAL TO ANY CHANGE ORDER SHALL CONSTITUTE A WAIVER OF THIS REQUIREMENT, AND SUCH BACKUP MATERIAL SHALL BE INTERPRETED AS THOUGH SUCH LANGUAGE DOES NOT EXIST.

AS TO THE SCOPE OF THIS CHANGE ORDER, CONTRACTOR EXPRESSLY UNDERSTANDS AND AGREES TO WAIVE THE PROVISIONS OF, AND ALL RIGHTS AND BENEFITS AFFORDED BY, CALIFORNIA CIVIL CODE SECTION 1542, WHICH PROVIDES IN FULL AS FOLLOWS:

**A GENERAL RELEASE DOES NOT EXTEND TO CLAIMS THAT THE CREDITOR OR RELEASING PARTY DOES NOT KNOW OR SUSPECT TO EXIST IN HIS OR HER FAVOR AT THE TIME OF EXECUTING THE RELEASE, AND THAT, IF KNOWN BY HIM OR HER, WOULD HAVE MATERIALLY AFFECTED HIS OR HER SETTLEMENT WITH THE DEBTOR OR RELEASED PARTY.**

This Change Order is hereby agreed to, accepted, and approved, and will be binding and enforceable upon approval by the Owner's governing body.

**Approved as to Form:**

\_\_\_\_\_  
 OUSD Facilities Counsel

\_\_\_\_\_  
 Date

Approved: Architect of Record _____  Date:	Approved and Agreed: General Contractor _____  Date:	Approved and Agreed: _____ Director of Facilities Date:
		_____ Deputy Chief of Facilities Date:

\_\_\_\_\_  
 Shanthy Gonzales, President  
 Board of Education

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Kyla Johnson-Trammell, Secretary  
 Superintendent, Board of Education

\_\_\_\_\_  
 Date

**CHANGE ORDER REQUEST  
(or Proposed Change Order)  
No. \_\_\_\_**

**PROJECT:** Project  
School

**DATE:**

**OWNER:** OAKLAND UNIFIED SCHOOL DISTRICT  
**CONTRACTOR:**

**DSA FILE NO.:** \_\_\_\_-\_\_\_\_\_  
**DSA APP NO.:** \_\_\_\_-\_\_\_\_\_  
**OUSD PROJECT #:** \_\_\_\_\_  
**PROJECT MANAGER:**

Contractor hereby submits this Change Order Request ("COR") pursuant to the contract documents, including but not limited to General Conditions sections 4.5.1, 4.5.2, 7.6, 7.7, 8.4.1, and 8.4.2.

DESCRIPTION OF PROPOSED CHANGES IN WORK (specifically refer to attached pages or incorporated documents):  
\_\_\_\_\_

OTHER PROPOSED CHANGES TO THE CONTRACT:  
\_\_\_\_\_  
\_\_\_\_\_

PROPOSED ADJUSTMENT TO CONTRACT PRICE:

PROPOSED ADJUSTMENT TO CONTRACT TIME: 0 calendar days

\*\*\*\*\*

**CERTIFICATION**

I, \_\_\_\_\_ [name of declarant/contractor], declare the following:

\_\_\_\_\_ [Contractor company name] has contracted with \_\_\_\_\_ [public entity name] for the \_\_\_\_\_ Contract ("Contract"). \_\_\_\_\_ [Contractor company name] authorized me to prepare the attached Change Order Request ("COR") for money and/or time extension for \_\_\_\_\_ [public entity name] regarding this Contract (such COR being dated \_\_\_\_\_, 20\_\_, and entitled \_\_\_\_\_, and requesting \$\_\_\_\_\_ and/or \_\_\_ additional days), and I prepared the attached COR. I am the most knowledgeable person at \_\_\_\_\_ [Contractor company name] regarding this COR.

The attached COR complies with all laws applicable to submission of a COR, including but not limited to California Penal Code section 72, Government Code sections 12650 et seq. (False Claims Act), and Business and Professions Code sections 17200 et seq. (Unfair Business Practices Act). I am aware that submission or certification of false claims, or other claims that violate law or the Contract, may lead to fines, imprisonment, and/or other serious legal consequences for myself or \_\_\_\_\_ [Contractor company name].

The attached COR does not breach the Contract, is not a false claim, does not violate any applicable law, satisfies all provisions of the Contract applicable to submission of the COR, only contains truthful and accurate supporting data, and only requests money and/or time extensions that accurately reflect the adjustments to money and time for which I believe that \_\_\_\_\_ *[public entity name]* is responsible under its Contract with \_\_\_\_\_ *[Contractor company name]*.

While preparing this declaration and COR I consulted with others (including attorneys, consultants, or others who work for \_\_\_\_\_ *[Contractor company name]*) when necessary to ensure that the statements were true and correct.

Contractor understands and agrees that any COR submitted without this certification does not meet the terms of the Contract Documents; that Owner, or Owner’s representatives, may reject the COR on that basis; and that unless Contractor properly and timely files the COR with the certification, Contractor cannot further pursue the COR in any forum and all rights to additional money or time for the issues covered by the COR are waived due to a condition precedent not having been satisfied.

I declare under the penalty of perjury under the laws of the State of California that the foregoing is true and correct. Executed \_\_\_\_\_, 20\_\_, at \_\_\_\_\_, California.

\_\_\_\_\_ *[signature]*  
 \_\_\_\_\_ *[name of declarant/contractor]*

Initiated By: _____ Architect of Record      Date	Reviewed By: _____ Project Manager      Date	Acknowledged By: _____ Contractor      Date
OUSD APPROVAL: _____ Director of Facilities      Date	OUSD Approval: _____ Deputy Chief      Date	



6.0

**CLOSEOUT**

## 6.1 | Project Closeout

To successfully close out a project, the CM/PM must complete the following steps:

- At the beginning of the construction phase, the PM/CM/PM should forward the DSA-102 contract information form and the DSA-5 project inspector qualification record to the closeout coordinator. All DSA forms should be loaded into the project file at the beginning of the project.
- Project closeout should be discussed at the start of the project, preferably during the pre-construction meeting. Project closeout will need to be carried as a line item in the OAC meeting minutes.
- When construction (or a phase) is substantially completed and the architect has issued a complete punch list, the certificate of substantial completion can be issued by the PM/CM. See section 6.2 for process instructions.
- Once the certificate of substantial completion has been issued, the PM/CM sets a meeting with the AOR, project inspector, and contractor to discuss the closeout process and the documents required from each entity. During this meeting, the team will review the DSA closeout checklist and the project closeout checklist.
- As soon as the certificate of substantial completion is issued, the PM/CM, contractor, and AOR finalize all AEDs, PCOs, and COs.
- After the contractor has completed all punch list items, a notice of completion (NOC) is filed. See Section 6.3 for instructions.
  - a. The NOC will not be signed by the deputy chief unless it is accompanied by a letter from the AOR stating that all punch list items have been completed by the contractor.
- Once the NOC has been filed, the PM/CM should collect the as-built drawings, operation & maintenance manuals (O&Ms), and warranties from the contractor. The as-built drawings and the O&Ms should be reviewed and signed off on by the project inspector and architect. Upon acceptance, these are delivered to the documents control specialist for record keeping. See Section 6.3 for additional instructions.

When the items on this list have been completed, and thirty-five (35) calendar days have elapsed from the filing of the NOC, the PM can begin releasing partial or full retention monies.

## 6.2 | Certificate of Substantial Completion Procedure

To successfully file the certificate of substantial completion for a project, the CM/PM must complete the following steps:

1. A certificate of substantial completion needs to be prepared and issued by the PM with a copy of the complete punch list that has been issued by the architect.
2. The certificate of substantial completion is to be signed by both the architect and the contractor prior to being submitted to the deputy chief for signature. Three wet signed copies of the certificate, each with a copy of the punch list, are required for the submittal.
3. Once the certificate of substantial completion copies have been signed, one copy is sent to the contractor, one is sent to the architect, and one is to be filed in the project files. A digital copy should also be filed.
4. The contractor is required to complete all punch list items within thirty-five (35) days of the date of the certificate of substantial completion.

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## 6.3 | Notice of Completion

1. A notice of completion needs to be issued before retainage can be released. The notice of completion form is located on the G: drive at PDATA\Standard Forms\2021 Forms in the Notice of Completion NOC folder.
2. The items that need to accompany the NOC are:
  - a. The request for signature cover sheet, listing all attachments.
  - b. Two copies of the NOC form filled out in their entirety.
  - c. The project completion letter and punch lists signed off by the architect (along with any special circumstances noted).

All these items will be submitted in one package to the executive director of Facilities Planning & Management for review before they go to the deputy chief for signature.

3. After both NOC copies are signed, the PM/CM/PE will scan a copy into the project file. The two originals of the NOC are to be submitted to the contract and bid specialist for delivery to the county clerk-recorder. The contract and bid specialist provides the PM with a copy or scan of the NOC after it has been stamped and recorded by the county. The county's recordation of the NOC starts the clock on the thirty five (35) days before contractor retainage can be fully released.
4. Upon receiving the finalized copy of the NOC, the PM/CM/PE should provide a copy to the following project team members:
  - Project accountant
  - Certified payroll manager
  - Local business utilization consultant
5. Note: In some circumstances when the NOC is submitted for signature, it can be noted that not all punch list items are completed, but all items will be completed within the thirty (30) days before retainage will be released. If these items are not completed in that time frame, then a portion of the retainage will be withheld. The standard withholding is 150% of the value of the item. Once the item has been completed and signed off on by all parties, the remaining retainage will be released.

**See the example of the Notice of Completion on the following page.**

<p>[EXEMPT FROM FILING FEES PURSUANT TO GOV. CODE § 27383]</p> <p>Recording Requested By: <b><u>Oakland Unified School District</u></b></p> <p>When Recorded, Mail To: Facilities Planning and Management 955 High Street Oakland, CA 94601 (510) 535-7044 (510) 535-7040 Fax</p>	<p>For Recorder's Use</p>
---	---------------------------

**NOTICE OF COMPLETION**

Notice pursuant to Civil Code Section 3093, must be filed within 10 days after completion. The completion of work is deemed to be the date of such acceptance by the Governing Board of the District (civil code 3086)

Notice hereby given that:

1. The undersigned is owner of the property hereinafter described:
2. Nature of Interest or Estate: **FEE**
3. The full name of the owner is: **Oakland Unified School District**
4. The full address of the owner is: **955 High Street, Oakland, CA, 94601**
5. A work of improvement on the property hereinafter described was completed and accepted on: [DATE]
6. The work done was: [PROJECT NAME]
7. The name and address of the contractor for such work of improvement was: [CONTRACTOR NAME]  
[CONTRACTOR ADDRESS]
8. Date of contract: [DATE]
9. The property on which said work of improvement was completed is located within the Oakland Unified School, County of Alameda, State of California, and is described and located as follows: [SITE NAME]

Dated: \_\_\_\_\_

\_\_\_\_\_  
Tadashi Nakadegawa, Deputy Chief of  
Facilities Planning and Management  
Oakland Unified School District

**VERIFICATION**

I, the undersigned, say: I am the Acting Executive Director of Facilities Planning and Management the declarant of the foregoing notice of completion; I have read said notice of completion and know the contents thereof; the same is true of my knowledge.

I declare under penalty of perjury that the foregoing is true and correct

Executed on \_\_\_\_\_, 2021, at Oakland, California.

\_\_\_\_\_  
Tadashi Nakadegawa, Deputy Chief,  
Facilities Planning and Management  
Oakland Unified School District

## 6.4 | DSA Closeout Coordination Procedure

The PM/CM/PE and AOR will collect all documents required for certified closeout by DSA. Closeout should begin at the beginning of the project by collecting the following documents:

- Approval of plans letter.
- Copies of all DSA-approved addenda.
- Form DSA-103 structural tests and inspections.
- DSA-102 contract information document signed by the architect of record, along with a list of the subcontractors.
- DSA-5 inspector qualifications and/or DSA-5 assistant inspector qualifications signed by the architect, engineer(s), if any, and District leadership. The forms must be approved by DSA.

Documents during the project:

1. Any CCD/A-CCD/B addendums, amendments, bulletins, and ASIs should be collected during construction.

Documents at the end of the project to be delivered to the PM/CM/PE and documents control specialists:

1. DSA-6 contractor's final verified report.
2. DSA-6 inspector's final verified report. (If there are change orders, the IOR must see the DSA-approved document or the person will not issue the form 6.) The inspector may also be required to issue a form DSA-121 checklist for a site inspection of relocatable buildings. This form is used instead of semi-monthly and/or monthly reports the IOR issues to DSA on portable projects because they are usually done in a short amount of time.
3. DSA-6A/E architect/engineer final verified report.
4. Testing documents, if any, as listed below:
  - DSA-291 laboratory verified report
  - DSA-292 special inspection verified report
  - DSA-293 geotechnical verified report
5. DSA-168 – final construction costs. This requires review by the PM/CM/PE to initiate final DSA payment.
6. Electrical ground rod test (portables/modular buildings).
7. Recorded notice of completion.
8. Any other miscellaneous items that may need special attention. (Please refer to the architect of record or inspector of record for confirmation.)

Submitting documents:

1. DSA utilizes the BOX system process for closeout documents.

## 6.5 | Final Payments Procedure

The following steps should be successfully completed before releasing final payments to the architect, contractor, and all miscellaneous vendors.

### **General Contractor:**

To release the final retainage monies to the general contractor, the following items need to be completed/submitted:

1. A signed-off punch list by the PM/CM.
2. Notice of completion needs to have been filed with the county for a minimum of thirty-five (35) calendar days.
3. A completed section 0065 release of claims needs to be submitted by the contractor.
4. A letter from the contractor requesting release of their escrow funds, if necessary.
5. A completed/signed DSA form 6 AE, PI, and C.
6. As-built drawings, operation and maintenance manuals, warranties and guarantees, and training videos.

### **Architect:**

To release the final payment to the architect, the following items need to be completed/submitted:

1. A completed and signed DSA form 6 AE, PI, and C.
2. Review of and sign off on the as-built drawings (including CAD drawings) and record sets, operation and maintenance manuals, and warranties/guarantees.
3. DSA approval of all PCOs/change orders.
4. DSA-certified closeout.

### **Inspector of Record:**

To release the final payment to the IOR, the following items need to be completed/submitted:

1. A completed and signed DSA form 6 AE, PI, and C.
2. Review of and sign off on the as-built drawings.
3. Dailies and inspection requests.
4. Any other forms needed by DSA.

5. Letter of closeout certification from DSA.

**Miscellaneous Vendors / Suppliers / Consultants / Special Inspections:**

To release the final payment to the miscellaneous vendors, the following items need to be completed/submitted:

1. Any final reports needed for DSA closeout.
2. Training (if necessary).
3. All items to be verified by and satisfactory to the site administrator, PM, and/or CM.
4. When submitting final payment, the vendor must explicitly indicate the request is for final payment.

Note: The notice of completion will only be signed by OUSD if it is accompanied by a letter from the architect of record (on firm's letterhead) stating that all work is completed per DSA-approved plans and specifications.

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## 6.6 | Post Construction Analysis

The post-construction document will capture all the pertinent data for each project and should be completed within 30 days after the filing of the notice of completion.

As part of the post-construction analysis, the PM should complete the projected project cost worksheet. The projected cost worksheet will reflect the final anticipated costs for the project. Within 30 days after filing the NOC, the PM should set up a meeting with their project accountant to review the project's future cost. Both the post-construction and the projected cost worksheets are to be filed in the project paper files and in the project electronic files on the G: drive.

**The post-construction data will include the following:**

1. Project name, project number, and site address
2. Original project budget, budget increases, and revised budget amount
3. Bid date, general contractor name, and bid amount
4. Original bid allowance amount and amount of allowance used on the project
5. Change orders and final contract amount
6. NTP date, original contract duration, substantial completion date, and notice of completion date
7. Original budget/scoping information
8. Project description
9. Construction narrative
10. Change order information
11. Close-out comments
12. Lessons learned to include, but not be limited to, evaluations and analyses of materials, consultants, communication, and contractors.

The post-construction and projected cost worksheet can be found on the G: drive in the Standard Forms 2021 folder.

Final anticipated costs and schedule.

At fiscal year end, the project accountant shall confirm with the PM/CM if any associated POs can be closed.

## 6.7 | As-Builts, O&Ms, and Warranties/Guarantees

To successfully close out a project, these items must be submitted by the contractor to the PM/CM within thirty (30) days of filing the notice of completion.

In addition to the physical documentation, the PM/CM should have documentation of receipt of the as-built drawings, operation & maintenance manuals, and warranties (e.g., a copy of transmittals for the project files).

### **As-Built Drawings/Record Drawings:**

1. The general contractor is to submit one (1) full-sized set of as-built drawings that have been updated to include all addenda, RFIs, ASIs, and all changed conditions on a project, including amendments, bulletins, and DSA CCD/A & CCD/B forms. The architect of record should supply the PM with physical and electronic copies of the record drawings and the CAD files for the project on a flash drive.
2. The as-built drawings must be reviewed and signed by both the architect and IOR. Both must sign before submitting the NOC.
3. The PM/CM will provide the physical and digital as-built sets to the documents control coordinator for logging and filling in the plan room. The documents control coordinator will then load a copy of the electronic as-built drawing files to the G: drive under the Kiosk.

### **Operation & Maintenance Manuals and Warranties/Guarantees:**

1. The general contractor must submit three (3) physical and one (1) electronic sets of operation & maintenance manuals and warranties/guarantees for a project. These documents are to be submitted in three-ring binders and should contain all the operation and maintenance information, warranties, and a complete list of subcontractors (including contact information for each) for the project. One set of each is delivered to the site, the documents control specialist, and B&G.
2. The O&M manuals are to be reviewed and approved by the architect before being sent to the PM/CM.

## 6.8 | Buildings and Grounds – Site Staff Training

All systems training is to be organized and coordinated by the PM/CM. The training should cover the following:

1. New mechanical systems
2. New electrical systems
3. New telephone systems
4. New intercom systems
5. New elevator installations
6. New intrusion alarm and fire alarm systems
7. New plumbing systems
8. New data installations
9. New irrigation installations
10. New lighting
11. Any other new systems (e.g. marquee signs, AV, projectors, etc.)

### **Training Requirements:**

- The training sessions should be attended by the general contractor, subcontractors, appropriate B&G staff, appropriate custodial staff, and a school staff representative.
- The training sessions should be held during the punch list time frame.
- The training sessions should be done following the requirements outlined in the project specifications. All trainings identified in the project specifications needs to be performed.
- The PM will document the attendees of all training sessions via a sign-in sheet. The PM will file the sign-in sheets in the project folder.
- All training sessions shall be video recorded by the general contractor and submitted to the PM, who will file and distribute them to B & G and appropriate site staff. Trainings should be recorded horizontally in landscape mode.
- The PM/CM should coordinate any start-up training with the commissioning agent if the project warrants or has any Title 24 MEP components and any BAS systems. PM to notify B&G before any system start-up and may be asked to video record the start-up.
- The PM shall conduct a project warranty walk, to include commissioning, 11 months post-construction. This walk will be scheduled as soon as possible.