

Office of the Superintendent of Public Instruction

Gap Analysis for Facilities Services Final Draft Report

MGT of America, Inc.
November 18, 2008



Table of Contents

| | |
|---|-----------|
| Chapter 1.0: Introduction and Background | 2 |
| Chapter 2.0: Methodology | 4 |
| Study Goal | 4 |
| Methodology | 4 |
| Chapter 3.0: Data Analysis | 8 |
| Planning..... | 9 |
| Design | 11 |
| Bidding..... | 12 |
| Construction | 12 |
| Occupancy and Post-Occupancy | 13 |
| Asset Preservation..... | 14 |
| Model Contracts | 15 |
| Summary | 18 |
| Chapter 4.0: Gap Analysis | 19 |
| Planning..... | 22 |
| Design | 24 |
| Bidding..... | 25 |
| Construction | 26 |
| Occupancy and Post-Occupancy | 27 |
| Asset Preservation..... | 28 |
| Summary | 29 |

Chapter 1.0: Introduction and Background

The 2007-09 Washington State Supplemental Biennial Capital Budget authorized funding (\$1.1 million) for the Washington State Office of the Superintendent of Public Instruction (OSPI) to develop and implement a Regional School Construction Technical Assistance Program. The intent of the program was to provide assistance to school districts in school construction matters. The legislature directed OSPI to target districts with the greatest need and deliver the assistance through the Educational Service Districts. The funding proviso is as follows;

Regional School Construction Assistance Program (08-2-857)

The appropriation in this section is subject to the following conditions and limitations: The appropriation is provided solely for the office of the superintendent of public instruction to develop and implement a regional school construction technical assistance program for school districts primarily delivered through educational service districts. The program will be prioritized towards school districts with the greatest need in terms of school construction management and school construction capabilities. In developing and implementing this program, to the maximum extent possible and appropriate, the office of the superintendent of public instruction shall receive assistance from the architectural and engineering services division of the department of general administration and the construction services group based out of educational service district 112. As part of the work, the office of the superintendent of public instruction shall review voluntary model contracts for school construction.

In July 2008, OSPI determined that it would be beneficial to prepare a “gap analysis” of existing school construction services as a basis for the program. OSPI contracted with MGT of America, Inc. (“MGT”) to conduct a study to determine what facility services are needed by school districts, to identify service delivery methods, and to make a recommendation regarding preferred delivery method(s) for a regional school construction assistance program.

The following report is *Deliverable 1* in this study and addresses the deficiencies in, barriers to, and gaps in facilities services offered to school districts across the state. *Deliverable 2* will provide recommendations on alternative methods of delivery for the needed services. *Deliverable 3* will be a series of presentations to various stakeholders, including OSPI, the Joint

Task Force, and/or other legislative committees if necessary regarding the data collected, analyses made, and recommendations developed through this study.

This report identifies the facility-related services that are currently used or desired by school districts, whether the service is provided by in-house staff, or an external service provider. Facility-related services begin in the planning phase of a facility or facility-related project, and continue throughout the facility's occupancy. These services can be grouped into phases which typically include planning, design, bidding, construction, occupancy and post-occupancy, and asset management. This report also identifies the providers of those services. These include private contractors/consultants, the Architectural and Engineering Services Division of General Administration ("GA"), the Educational Service Districts ("ESDs"), the Construction Services Group of Educational Service District 112 ("CSG"), and OSPI.

In addition, this report looks at the impact of district size and what effect that might have regarding securing a service, the availability of the service, and the quality of the service. Were the issues, gaps or barriers for small or medium-sized districts significantly different from the issues for large-sized districts? Finally, the report explores the need for offering voluntary model contracts for school construction and how such contracts would address any of the deficiencies, barriers or gaps identified by the districts or service providers. Would it be helpful for OSPI or others to develop model contracts that districts could use to secure the services of architects or general contractors or project managers?

Chapter 2.0: Methodology

Study Goal

The goal of *Deliverable 1* of this study is to prepare a gap analysis identifying the gaps and deficiencies in facility services currently being offered to or in use by school districts. Additionally, the analysis will identify barriers that prevent districts from using facility services that are currently offered.

Methodology

Data to prepare the analysis was collected through interviews with school districts and service providers across the state. The work included the following major tasks:

DISTRICT IDENTIFICATION

MGT staff, in conjunction with OSPI staff, identified a total of 12 school districts to be interviewed. The sample included small, medium, and large districts from both eastern and western Washington. District size was defined as follows:

Small: Fewer than 3,000 students
Medium: 3,000 to 15,000 students
Large: More than 15,000 students

The final sample of school districts (as shown below in *Exhibit 2-1*) includes one large and one medium-sized district, and four small districts from each side of the state, reflecting the fact that more than half of the districts in the state have fewer than 3,000 students.

**Exhibit 2-1
Sample School Districts**

| | |
|-------------------------|---|
| Large Districts | Tacoma Spokane |
| Medium Districts | Bellingham Pasco |
| Small Districts | Aberdeen Montesano Port Angeles Riverview Pullman Davenport Cascade Columbia |

Source: MGT of America, Inc., 2008.

DISTRICT INTERVIEW PROTOCOL

MGT staff worked with OSPI staff to develop a protocol that would be used during each interview. The questions were aimed at identifying deficiencies, barriers, and gaps in school facility services. The questionnaire is included in *Appendix A*.

DISTRICT INTERVIEWS

OSPI staff sent an introductory letter and a copy of the interview protocol to the identified school districts, indicating the purpose of the study and requesting the districts to participate. MGT staff contacted each school district to arrange for a face-to-face interview. In some districts, the superintendent was available for the interview. In others, assistant superintendents or business office staff answered the questions. In one district, the Business Manager and the district’s privately contracted project managers were interviewed. All interviews were held in the districts during August 2008. MGT captured district responses to the protocol questions and transcribed those responses into a spreadsheet, providing the capacity to sort by district size and geographic location as well as by the question. The district responses are included in *Appendix B*.

SERVICE PROVIDER IDENTIFICATION –

MGT and OSPI staff identified the following service providers:

All Nine Educational Service Districts

ESD 101 – Spokane
ESD 105 – Yakima
ESD 112 – Vancouver
ESD 113 – Olympia
ESD 114 – Bremerton
ESD 121 – Renton
ESD 123 – Pasco
ESD 171 – Wenatchee
ESD 189 – Anacortes

ESD 112 Construction Services Group (CSG)

Architectural and Engineering Services Division of the Department of General Administration (GA)

Three private A&E/construction management firms

GALCo Engineering Services

Olympic Associates Company

Heery Architects

SERVICE PROVIDER INTERVIEW PROTOCOL

MGT staff worked with OSPI staff to develop a protocol that would be used during each interview. The questions were aimed at identifying the services provided and any deficiencies, barriers, and/or gaps in services for school facility construction. In addition, the service providers were asked if they knew of any additional services that could be, but were not currently provided. The interview protocol is included in *Appendix C*.

SERVICE PROVIDER INTERVIEWS

OSPI staff sent an introductory letter and a copy of the interview protocol to the identified service providers, indicating the purpose of the study and requesting the service

providers to participate. MGT staff contacted each service provider to arrange for a face-to-face interview. In each ESD, the superintendent participated in the interview. In several cases, the business manager or other ESD facility-related staff also participated. All ESD interviews were held in the educational service district offices during August 2008.

MGT staff also interviewed staff at the Architectural and Engineering Services Division of General Administration (“GA”) at the state offices using the same service provider interview protocol.

Representatives from the private A&E/construction management firms were interviewed either in their offices, in MGT’s Olympia office, or by telephone.

MGT captured responses to the protocol questions and transcribed those responses into a spreadsheet, providing the capacity to sort by question number. The responses to the interview questions are included in *Appendix D*.

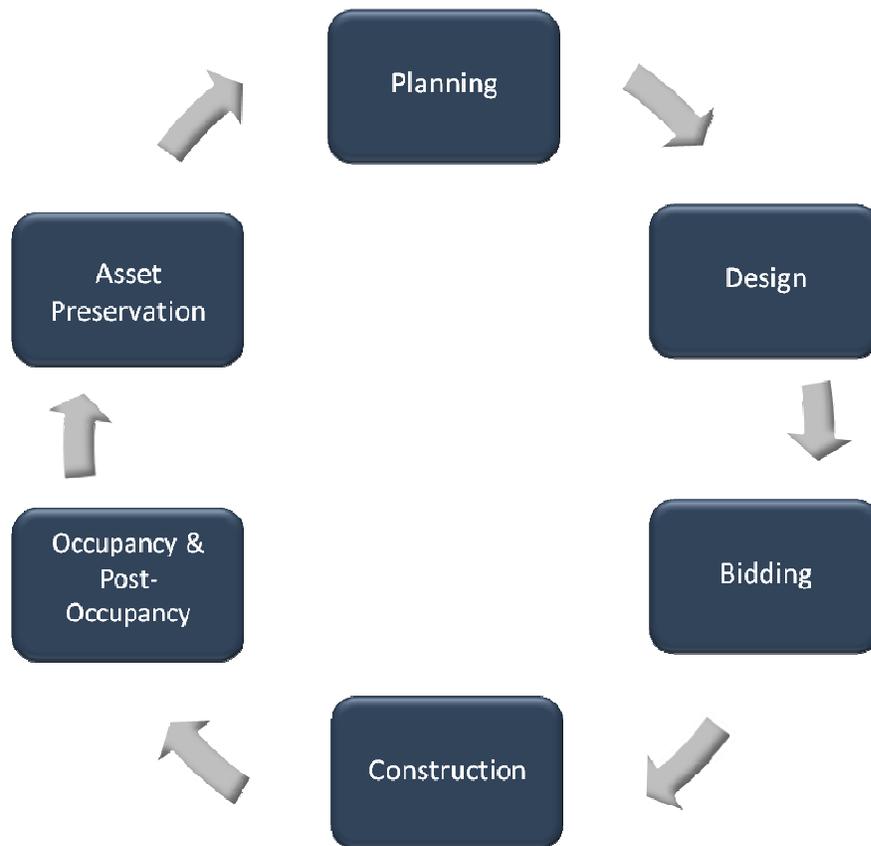
DATA ANALYSIS

MGT staff analyzed the results of the interviews and categorized the data into gaps, deficiencies and barriers. Chapters 3.0 and 4.0 of this report discuss that analysis.

Chapter 3.0: Data Analysis

This chapter presents the results of the interviews with the six principal groups involved in this study, which include the sample school districts, the ESDs, the Construction Services Group at ESD 112 (“CSG”), the Engineering and Architectural Services Division of General Administration (“GA”), and private service providers. The interviews focused on what facility-related services were currently being used, who was offering those services, and which services were needed but not currently offered, were currently offered but somehow deficient, and what if any barriers existed to the districts in receiving the services.

Since there are numerous services relating to facilities, we have arranged the services into typical industry standard phases. The graphic below shows each of these phases and the order in which they normally occur.



These phases are somewhat self-explanatory with the exception of, perhaps, the last two. “Occupancy” and “Post-Occupancy” refer to the time period when the contractor turns over the building/project to the owner and the year which follows. “Asset Preservation” covers the time period after “Occupancy” and “Post-Occupancy” and until the next planning phase starts the cycle over again.

The following sections of this chapter provide an overview of the services within each phase and the current status regarding the provision of these services. The graphics are organized to show the services that are provided to school districts and who is providing those services. As can be seen, services are currently provided by both public and private sector agencies. In addition, some school districts (primarily the larger districts) provide services in-house. OSPI’s role is shown as primarily providing support and consultation to the districts, in addition to ensuring compliance with the state requirements for projects funded with state funding. Consultation is provided in the form of technical assistance throughout all phases of planning and construction. In addition, OSPI has created a positive culture of customer service in supporting school districts.

Planning

The planning phase includes those activities and services that typically take place to determine whether a facilities project is needed or desired. The project may include a major renovation, new construction, demolition or the closure of an existing facility.

Exhibit 3-1 lists the services generally needed by school districts during this phase and the entities which offer those services (service provider). A shaded box appears under a service provider to indicate that the service is provided, generally for a fee, to school districts. School districts that provide the service with in-house staff are indicated as well.

**Exhibit 3-1
Planning Phase Services and Providers**

| OSPI | School Districts In-House | | | Planning Services | Public Sector | | | Private Sector |
|--|---------------------------|------|-------|---|---------------|----|-----|----------------------------|
| | Small | Med. | Large | | ESDs | GA | CSG | AE/PM/CM/ Planning Firm |
| Compliance Support Consultation Funding | | | | Consultation | | | | |
| | | | | Facility Assessments | * | | | |
| | | | | Inventory | * | | | |
| | | | | Demographics | * | | | |
| | | | | Capacity and Utilization | * | | | |
| | | | | Community and Staff Interaction | * | | | |
| | | | | Project Delivery Methodology and Schedule | * | | | |
| | | | | Funding Strategies | | | | |
| | | | | Site Selection and Acquisition | * | | | |
| | | | | School Closures | | | | |

Source: MGT of America, Inc., 2008.

Three clarifications are helpful in interpreting this exhibit and the following exhibits in this chapter. When the exhibit indicates that a service is offered by the ESDs, it means that at least one ESD (other than 112’s CSG) offers the service. An asterisk indicates that some ESDs are providing the service via CSG staff. It may or may not be offered by all ESDs, but typically is not. Secondly, GA offers many facility-related services to other state agencies including community colleges, corrections, and the Department of Social and Health Services. These exhibits only address those services which GA currently offers or has attempted to offer to school districts in the recent past. And third, when the exhibit indicates that districts are providing a service with in-house staff, this is not necessarily the case for every district.

As *Exhibit 3-1* indicates, most planning phase services are offered by CSG and private companies, or districts accomplish the planning tasks with in-house staff. Private companies typically include architectural firms, facility planning consultants, and, to a lesser degree, construction management companies. (Note; construction management companies are also called program managers which generally refers to managing all of a district’s construction projects.) The two exceptions are general consultation and funding strategies, which are offered by most public and private sector service providers.

Design

The design phase includes those services necessary to prepare the project for competitive bidding. It should be noted that not all projects follow the design-bid-build model for project delivery. Some school districts are now using some form of general contractor/construction manager (GC/CM) cost delivery methods and are allowed to use design-build delivery model. These latter delivery models include the same services overall, but the phases may be broken down a little differently.

The major activity during this phase is documenting the scope of work for the project and preparing the contract documents (contract, specifications, and drawings). *Exhibit 3-2* lists the services offered by the major service providers.

Exhibit 3-2
Design Phase Services and Providers

| OSPI | School Districts In-House | | | Design Services | Public Sector | | | Private Sector |
|--|---------------------------|------|-------|--------------------------------------|---------------|----|-----|----------------------------|
| | Small | Med. | Large | | ESDs | GA | CSG | AE/PM/CM/ Planning Firm |
| Compliance Support Consultation Funding | | | | Project Management | * | | | |
| | | | | Financial Management | | | | |
| | | | | Design Team Selection | * | | | |
| | | | | Educational Specifications | * | | | |
| | | | | Design Services & Contract Documents | | | | |
| | | | | Value Engineering | * | | | |
| | | | | Constructability | * | | | |
| | | | | Energy Life Cycle Cost Analysis | | | | |
| | | | | | | | | |
| | | | | | | | | |

Source: MGT of America, Inc., 2008.

For the most part, design phase services are offered by CSG, private companies, and GA. However, it should be noted that the design services currently offered by GA are for small projects through GA's Plant Operations Support Consortium. GA does not typically offer design phase services to school districts for major renovation or new construction projects. This

relationship for GA and the school districts is generally true throughout all the phases of service offerings.

Bidding

The bidding phase is brief relative to the other phases. Nevertheless, this phase is critical because, in the design-bid-build delivery model, this is when the contractor joins the process and the scope of the project can be impacted by the markets or the bidding environment. *Exhibit 3-3* lists the services in this phase.

**Exhibit 3-3
Bidding Phase Services and Providers**

| OSPI | School Districts In-House | | | Bidding Services | Public Sector | | | Private Sector |
|--------------|------------------------------|------|-------|---------------------------------|---------------|----|-----|----------------------------|
| | Small | Med. | Large | | ESDs | GA | CSG | AE/PM/CM/ Planning Firm |
| Compliance | | | | Project Management | * | | | |
| Support | | | | Financial Management | * | | | |
| Consultation | | | | Bid Review & Recommendations | * | | | |
| Funding | | | | Construction Contracts | * | | | |

Source: MGT of America, Inc., 2008.

The ESDs do not play a significant role in providing services in this phase or in the following phases. OSPI’s role providing approvals and ensuring compliance for state funded projects.

Construction

Services offered during the construction phase, other than the actual construction activity, center mostly on controlling the quality, cost, and schedule for the project. Historically, these services were offered by architectural and engineering firms, but are now offered by CSG as well as construction management firms. *Exhibit 3-4* lists the services and providers for this phase.

**Exhibit 3-4
Construction Phase Services and Providers**

| OSPI | School Districts In-House | | | Construction Services | Public Sector | | | Private Sector |
|--|---------------------------|------|-------|---------------------------------------|---------------|----|-----|----------------------------|
| | Small | Med. | Large | | ESDs | GA | CSG | AE/PM/CM/ Planning Firm |
| Compliance Support Consultation Funding | | | | Project Management | * | | | |
| | | | | Financial Management | * | | | |
| | | | | Testing | | | | |
| | | | | Quality Control | * | | | |
| | | | | Furniture, Fixtures, And Equipment | * | | | |
| | | | | Inspection | | | | |
| | | | | Dispute Resolution | | | | |
| | | | | | | | | |

Source: MGT of America, Inc., 2008.

Occupancy and Post-Occupancy

The occupancy / post-occupancy phase is the period from when the contractor transfers the project to the building owner and to the end of the first year of occupancy. This phase is very important as even the best projects can become problematic if this phase is not carefully implemented. In new construction, the school district must successfully move into the building and operate it. This requires careful planning and training for all the building's operating systems. In addition, many warranty issues arise in this period and need professional management for successful outcomes. *Exhibit 3-5* lists the services and providers.

**Exhibit 3-5
Occupancy and Post-Occupancy
Services and Providers**

| OSPI | School Districts In-House | | | Occupancy & Post-Occupancy Services | Public Sector | | | Private Sector |
|--------------|---------------------------|------|-------|-------------------------------------|---------------|----|-----|----------------------------|
| | Small | Med. | Large | | ESDs | GA | CSG | AE/PM/CM/ Planning Firm |
| Compliance | | | | Project Management | * | | | |
| Support | | | | Financial Management | * | | | |
| Consultation | | | | Warranty Management | * | | | |
| Funding | | | | Commissioning | * | | | |
| | | | | Training in Systems & Operation | * | | | |

Source: MGT of America, Inc., 2008.

Asset Preservation

The asset preservation phase begins after the first year of occupancy and continues until the next major planning phase occurs for the facility. This phase may include small improvement or maintenance projects for the facility, but is generally concerned with operating the facility in the most efficient and effective manner. *Exhibit 3-6* lists the services for this phase.

**Exhibit 3-6
Asset Preservation Phase
Services and Providers**

| OSPI | School Districts In-House | | | Asset Preservation Services | Public Sector | | | Private Sector |
|--------------|---------------------------|------|-------|---------------------------------------|---------------|----|-----|----------------------------|
| | Small | Med. | Large | | ESDs | GA | CSG | AE/PM/CM/ Planning Firm |
| Compliance | | | | Plant Operations Management & Support | | | | |
| Support | | | | Small Projects Management | | | | |
| Consultation | | | | Performance Contracts | | | | |
| Funding | | | | Asset Preservation Planning | | | | |
| | | | | Energy Management | | | | |
| | | | | Facility Planning | * | | | |

Source: MGT of America, Inc., 2008.

The asset preservation phase is typically the longest phase in a facility's life cycle and can therefore be the most critical in maintaining a facility that supports and enriches the educational experience of the students. If sufficient or appropriate services are not available during this phase, the return on the capital investment in the facility may be less than satisfactory.

Model Contracts

One objective of this study is to assess the need for model contracts for school construction. The model contract would govern the agreements between the school district and the consultants and/or the contractor, construction manager, or program manager. Model contracts act like templates that ensure all required issues are addressed, and can be modified to fit the specific needs of a district and or its project.

CURRENT SITUATION

Many governmental agencies, including some medium and most large school districts, have standard contracts to govern the construction process. Small school districts do not often have a standard contract since they don't frequently engage in construction projects. A small school district will typically ask its attorney to prepare a contract. (There is currently at least one law firm in the state of Washington that performs this work for a number of school districts.)

Professional associations such as the American Institute of Architects ("AIA") and the Associated General Contractors ("AGC") have standard contracts covering all the typical owner-consultant, owner-contractor relationships. These model contracts are widely used and modified.

GA also provides model contracts for the work it oversees for governmental agencies. These contracts have been tailored over the years to reflect lessons learned by this agency. GA states that these contracts could benefit school districts by helping them avoid possible conflicts/disputes in their construction projects.

During MGT's interviews for this study, some service providers stated that school districts would typically have their attorney review any model contract prior to executing it, and consequently the model contract would not save fees or be more cost effective. At the same

time, concern was expressed that some districts, especially small ones, use attorneys who are not skilled in construction law, and might receive less than the most effective counsel.

CURRENT SITUATION IN OTHER STATES

MGT conducted a review of the use of model contracts in other states. The review focused on those states which had a state facilities commission, or had departments of education that were active in the capital construction area.

Some of the states reviewed provided some type of model contract or contract template for school districts to use during construction projects. *Exhibit 3-7* provides a link to the state agencies and a brief description of what they offer.

**Exhibit 3-7
Use of Model Contracts in Various States**

| Model Contracts - States/Organizations | Offerings |
|---|---|
| Minnesota Office of Administration | Design/build contract and non-design/build, also provides guidelines for space and sustainability |
| Massachusetts School Building Authority | Guidelines, model request for services (RFS), design/build contract, and CM-at risk contract |
| Ohio Facilities Commission | Contracts for the different facilities assistance programs offered by the OFCC |
| Wyoming School Facilities Commission | Design/build contract, CM at-risk contract, educational specifications samples |
| New Mexico Public School Facilities Authority | Construction admin forms, design professional forms, master planning contract, school construction guidelines |
| Idaho Department of Administration | A/E letter contract, construction management forms |
| Oregon Department of Administrative Services, Facilities Division | Standard Professional Services Contract for Architectural, Engineering, Land Surveying and Related Services |
| Montana Department of Administration | <u>Provide the following boilerplates:</u> Architect Engineer Bid Openings Bid Results Construction Contract Boilerplate |
| North Carolina State Construction Office | Contracts for construction, CM at-risk, and design as well as construction/design admin. forms |

**Exhibit 3-8
Use of Model Contracts in Various States
(continued)**

| Model Contracts - States/Organizations | Offerings |
|--|---|
| Virginia Division of Engineering & Buildings | <u>The DEB provides the following contracts/services:</u> Pre-Qualified SWaM Contractors List Services for Environmental Assessment, Facility Assessment, Commissioning and Testing and Balancing Non Professional Construction Related Services Construction Testing and Environmental Services Energy Performance Contracting Institute for Building Technology and Safety (IBTS) Agreement |
| Pennsylvania Department of General Services | General A/E contract with requirements specifications |
| AIA | A/E contracts for every facet of the design/build process |

Source: MGT of America, 2008.

Summary

This review has listed the facility-related services as identified by the sample school districts and the service providers. As those familiar with the industry know, new services are developed constantly to meet new needs or existing needs in new ways. In addition, there are some very specific services that are included in the “project management” or “financial management” services which have not been listed individually.

The fact that a service is offered, does not mean that it is readily available to all districts or that the offering does not need some type of improvement. The next chapter will examine the gaps, barriers and deficiencies in the facility related needs and services.

Chapter 4.0: Gap Analysis

This chapter presents the analysis (gaps, deficiencies, barriers) of the services provided and the standard services required, as discussed in chapter 3 above. For each of the services listed the analysis identifies where gaps, deficiencies and/or barriers exist. In order to determine if a particular circumstance exists, the following definitions were applied:

- ◆ A gap exists when there is a need and no service is provided or components of services are not provided.
- ◆ A deficiency exists when the service is available but is not available to the level needed.
- ◆ A barrier exists when the service is available but is difficult to access.

It should be noted there is no distinction in the degree of severity between a gap, a deficiency, or a barrier. Anyone of the three can be a minor or major impediment.

The intent of this analysis is to identify those areas of facility-related services that could be improved and or provided more efficiently. While it is important to look at each of the categories it should be recognized that there will be areas of overlap. Where that occurs recommendations will be developed that address each component.

As with the data analysis provided in Chapter 3 above, the service areas are arranged by the typical industry-standard phases.

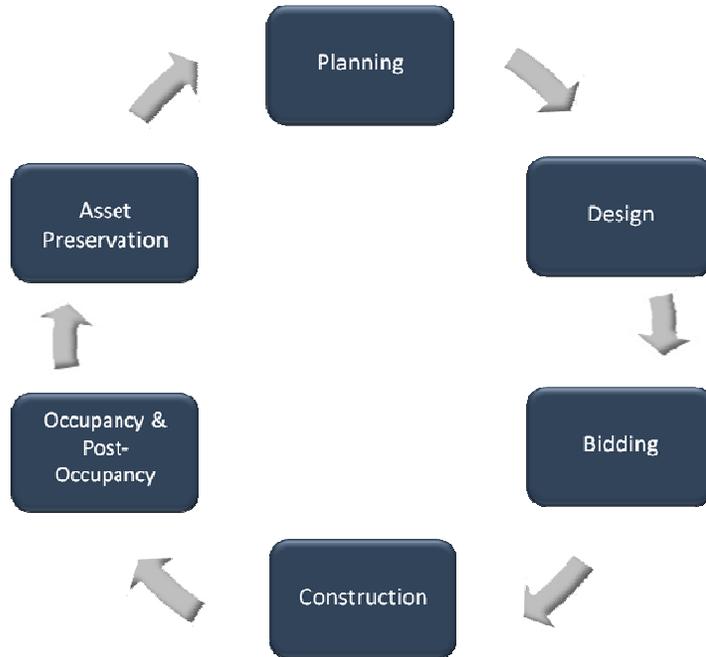
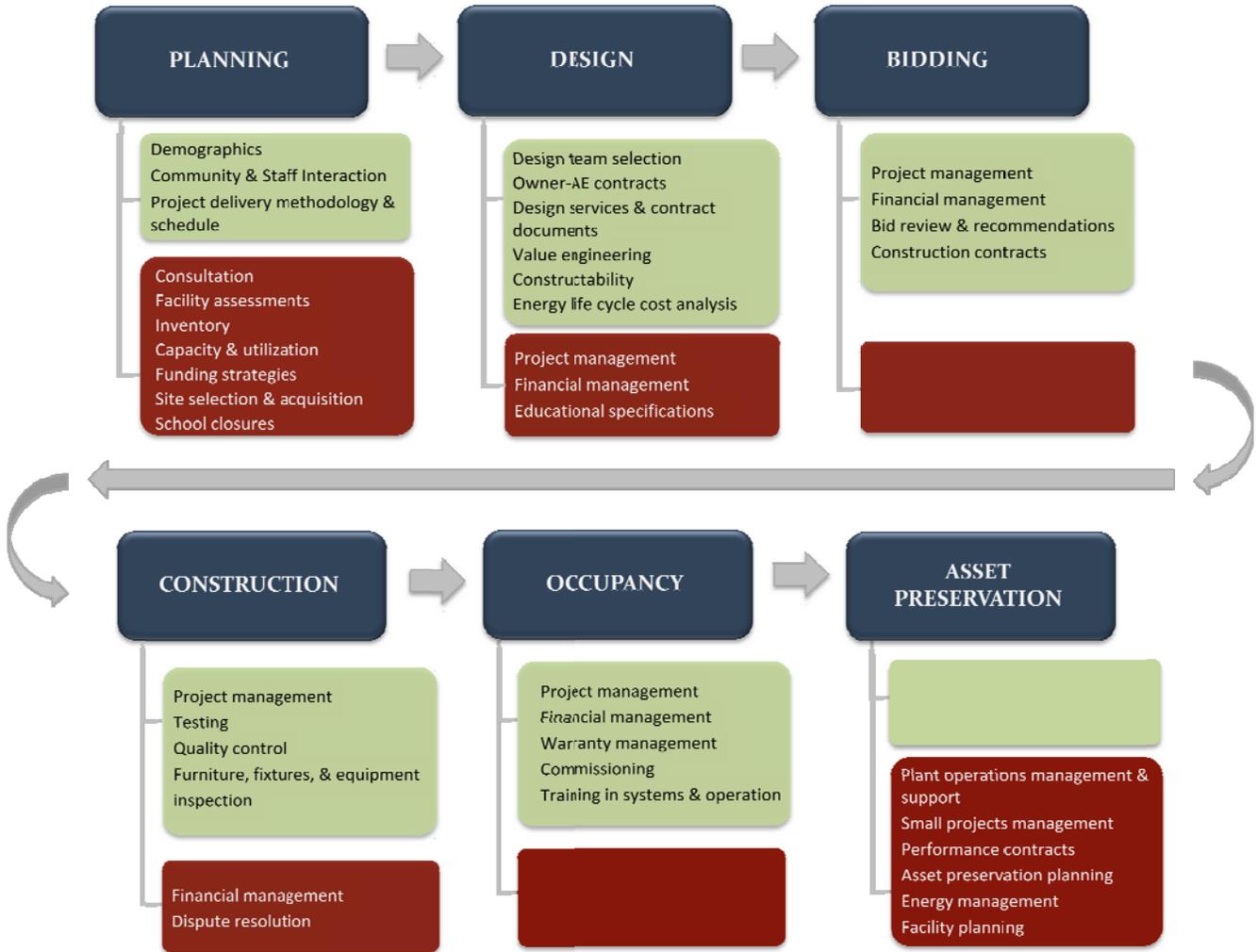


Exhibit 4-1 below shows in flowchart format each of the standard phases and where gaps, deficiencies and/or barriers exist. The green (upper) boxes under each phase show the functions that are being met under the current structure while the red (lower) boxes show the functions that have need.

**Exhibit 4-1
Gaps, Deficiencies, and/or Barriers**



Source: MGT of America, Inc., 2008.

The sections below provide the specific detail regarding the gaps, deficiencies, and barriers in service for each of the stages. The exhibits identify which service is impeded with a colored cell and where a potential for the construction assistance program exists.

Planning

The planning phase includes those activities and services that typically take place to determine whether a facilities project is needed or desired. The project may include a major renovation, new construction, demolition, or the closure of an existing facility. *Exhibit 4-2* lists the services generally needed by school district during this phase and where gaps, deficiencies, and/or barriers exist.

Exhibit 4-2
Planning Phase Gaps, Deficiencies and Barriers

| Planning | Gap | Deficiency | Barrier |
|---|-----|------------|---------|
| Consultation | | | |
| Facility Assessments | | | |
| Inventory | | | |
| Demographics | | | |
| Capacity And Utilization | | | |
| Community And Staff Interaction | | | |
| Project Delivery Methodology And Schedule | | | |
| Funding Strategies | | | |
| Site Selection And Acquisition | | | |
| School Closures | | | |

Source: MGT of America, Inc., 2008.

As *Exhibit 4-2* indicates, facility planning services are one of the areas of most need. Specific issues regarding the needs in each of the planning areas include:

1. Consultation

- ◆ There is a lack of information about services available from the various providers. Several districts were not aware of the array of services available from GA or which services were offered by private sector providers.
- ◆ Some districts were not aware of GA's Plant Operations Consortium, which offers consultation on a variety of building maintenance issues.
- ◆ Medium and small districts look first to the ESD's for services and information.

2. Facility assessments

- ◆ The study and survey assessment process has not been updated for some time and is not computerized. The data from each district is not stored in a data base which could then be used to perform state-wide analyses.
- ◆ The study and survey assessments only assess physical condition of the buildings and do not assess the condition of the site infrastructure, functional adequacy, or information technology infrastructure.

3. Facility inventories

- ◆ There is no standard format for inventories and many districts maintain inventories only as necessary for insurance purposes. An inventory structure would identify and organize data elements to be collected so that the school, building and room inventories could be standard across the state.
- ◆ Standardized inventories could be used to calculate program-based capacities (see *Capacity and Utilization* below).

4. Demographics

- ◆ The state has cohort enrollment projections for school districts to be used for school construction purposes in determining the number of un-housed students and qualify districts for new school construction assistance.
- ◆ However, the state does not provide enrollment projections for operation planning, as some other states do, but districts did not report this as a need.

5. Capacity and utilization

- ◆ The capacity of a school is only calculated using the number of SF per student and does not use a functional capacity model. A functional capacity model would look at the educational program housed in a facility, the room uses of that program, and the student-teacher ratios for the program to calculate the capacity.

6. Project delivery

- ◆ There is need for unbiased consultation on project delivery methods to small districts. Districts can now use alternative project delivery methods to the design-bid-build approach such as design-build, and general contractor-construction management. These approaches have pros and cons and must be evaluated carefully for a district to choose the best approach for a particular project.

7. Funding strategies

- ◆ There is need for unbiased consultation on funding strategies to small districts. Similar to project delivery choices, districts need unbiased information to choose the best funding strategy for each project.

8. Site acquisition

- ◆ There is a need for unbiased consultation on site acquisition methods to small districts. Many districts do not acquire sites for new schools on a frequent basis and do not have the information or skills necessary to make effective decisions.

Design

The design phase includes those services necessary to prepare the project for competitive bidding. The major activity during this phase is documenting the scope of work for the project and preparing the contract documents (contract, specifications, and drawings). *Exhibit 4-3* lists the services generally needed by school districts during this phase and where gaps, deficiencies, and/or barriers exist.

**Exhibit 4-3
Design Phase Gaps, Deficiencies and Barriers**

| Design | Gap | Deficiency | Barrier |
|--|-----|------------|---------|
| Project Management | | | |
| Financial Management | | | |
| Design Team Selection | | | |
| Owner-A/E Contracts | | | |
| Educational Specifications | | | |
| Design Services And Contract Documents | | | |
| Value Engineering | | | |
| Constructability | | | |
| Energy Life Cycle Cost Analysis | | | |

Source: MGT of America, Inc., 2008.

As *Exhibit 4-3* indicates, most design phase needs are being met under the current structure. There are, however, some issues in the areas of project management, financial management and educational specifications and those issues are different depending on district size. Specific issues regarding the needs in design services include:

1. Project Management

- ◆ Project management services are available but somewhat impeded in some circumstances. Current regulatory/approval processes can cause delays in the design phase. The regulatory/approval process may require the approval of the school board which only meets monthly, instead of allowing authorized staff approval authority.

2. Financial Management

- ◆ Small- and medium-sized districts may need assistance, depending on the size and scope of the project(s), to successfully financially manage a project. Some ESDs are

offering financial management services but there may be a need for additional ESDs to offer these services.

3. Design team selection

- ◆ No issues identified.

4. Owner-AE contracts

- ◆ No issues identified.

5. Educational specifications

- ◆ Some districts may need assistance to ensure an educational program focus in their educational specifications, rather than a facility/architecture focus. There may be a need for model educational specifications to give districts a starting place.

6. Design services and contract documents

- ◆ No issues identified.

7. Value engineering

- ◆ No issues identified.

8. Constructability

- ◆ No issues identified.

Energy lifecycle cost analysis

- ◆ No issues identified.

Bidding

The bidding phase includes the following elements:

- ◆ Project management
- ◆ Financial management
- ◆ Bid review and recommendations
- ◆ Construction contracts

These services are being provided by GA, CSG and/or the private sector and no gaps, deficiencies or barriers were noted.

Construction

Services offered during the construction phase, other than the actual construction activity, center mostly on controlling the quality, cost, and schedule for the project. Historically, these services were offered by architectural and engineering firms, but now are offered by CSG and construction management firms as well. *Exhibit 4-4* lists the services generally needed by school district during this phase and where gaps, deficiencies, and/or barriers exist.

**Exhibit 4-4
Construction Phase Gaps, Deficiencies and Barriers**

| Construction | Gap | Deficiency | Barrier |
|------------------------------------|-----|------------|---------|
| Project Management | | | |
| Financial Management | | | |
| Testing | | | |
| Quality Control | | | |
| Furniture, Fixtures, And Equipment | | | |
| Inspection | | | |
| Dispute Resolution | | | |

Source: MGT of America, Inc., 2008.

As *Exhibit 4-4* indicates, most construction phase services are being met under the current structure. There are, however, gaps noted in the areas of financial management and dispute resolution. Specific issues regarding the needs in construction services include:

1. Project Management –

- ◆ No issues identified

2. Financial Management

- ◆ Small and medium-sized districts may need assistance, depending on the size and scope of the project(s), to manage the financial transactions of a construction or renovation project. (These activities would include reviewing pay requests, calculating retainages, issuing payments and lien releases, etc.) Some ESDs are offering financial management services but there may be a need for additional ESDs to offer these services.

3. Testing

- ◆ No issues identified

4. Quality control

- ◆ No issues identified

5. Furniture, fixtures, equipment

- ◆ No issues identified

6. Inspection

- ◆ No issues identified

7. Dispute resolution –

- ◆ GA could increase the awareness of their dispute resolution services and/or ESDs/OSPI could offer this service.

Occupancy and Post-Occupancy

The occupancy / post-occupancy phase includes the following elements:

- ◆ Project management
- ◆ Financial management
- ◆ Warranty management
- ◆ Commissioning
- ◆ Training in systems and operation

These services are currently provided by GA, CSG and/or the private sector and no gaps, deficiencies or barriers were noted.

Asset Preservation

The asset preservation phase begins after the first year of occupancy and continues until the next major planning phase occurs for the facility. This phase may include small improvement or maintenance projects for the facility, but is generally concerned with operating the facility in the most efficient and effective manner. *Exhibit 4-5* lists the services generally needed by school districts during this phase and where gaps, deficiencies, and/or barriers exist.

Exhibit 4-5
Asset Preservation Phase Gaps, Deficiencies and Barriers

| Asset Preservation | Gap | Deficiency | Barrier |
|---------------------------------------|-----|------------|---------|
| Plant Operations Management & Support | | | |
| Small Projects Management | | | |
| Performance Contracts | | | |
| Asset Preservation Planning | | | |
| Energy Management | | | |
| Facility Planning | | | |

Source: MGT of America, Inc., 2008.

The asset preservation phase is typically the longest phase in a facility’s life cycle and can therefore be the most critical in maintaining a facility that supports and enriches the educational experience of the students. If sufficient or appropriate services are not available during this phase, the return on the capital investment in the facility may be less than satisfactory. Similar to the planning phase, asset preservation is a phase where the highest level of need was identified. Specific issues regarding the needs in each of the asset management areas include:

1. Plant operations support

- ◆ Plant operations support services should be more widely available. Many districts are not aware of the plant operations support offered through GA.
- ◆ Multiple small districts may be able to share the services of a project manager for asset preservation projects.

2. Small projects management

- ◆ Small projects management services should be more widely available both through consultations such as GA offers, and through the sharing of skilled mechanics or pools of tradespersons.
- ◆ There is a need for the ESDs to maintain a small works roster of vetted contractors who have agreed to established hourly charges that can be utilized by small to medium districts.

3. Performance contracts

- ◆ There is need for unbiased consultation on performance contracting methods to small districts. Performance contracts are used to upgrade building systems and use the savings in energy use to pay for the upgrades. Financing this kind of project and accurately measuring the energy savings can require fairly sophisticated project management methods.

4. Asset preservation planning

- ◆ While asset preservation planning is available through private facility planners and CSG, districts tend to not plan more than is required by the state grant process. Few districts have comprehensive maintenance or preventive maintenance programs.
- ◆ There is a need for OSPI to develop an asset planning program, similar to the capital construction program, for all districts.

5. Energy management

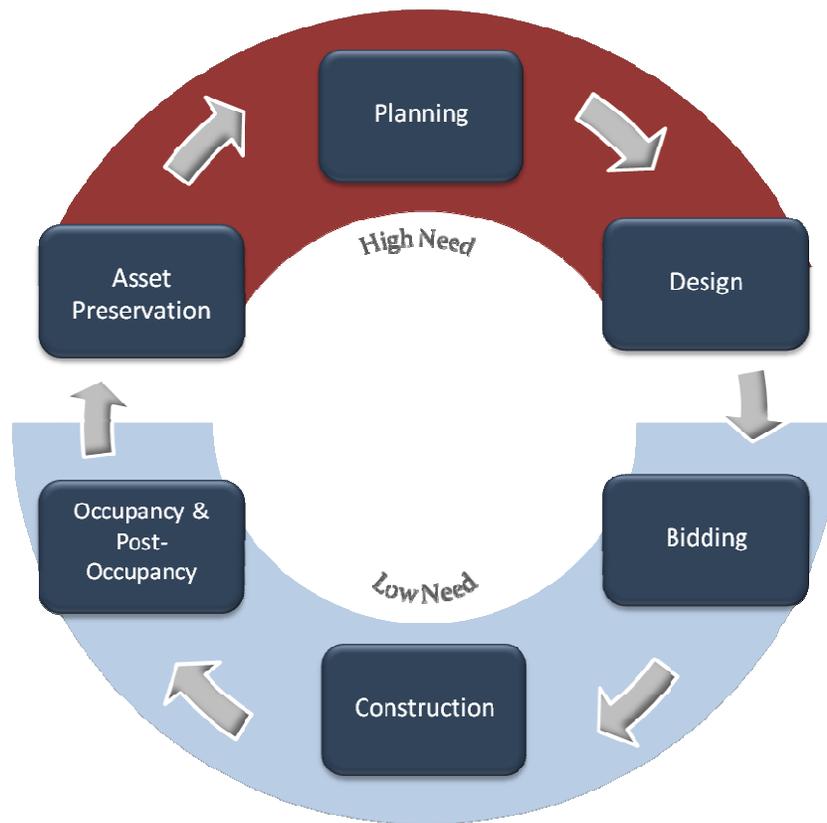
- ◆ More ESDs should offer energy management consultations and programs to small- and medium-sized districts. These programs will more than pay for themselves in reduced energy use.

Summary

This review has identified where gaps, deficiencies and/or barriers exist based on reviews with the sample school districts and service providers. Clearly, facility related services are offered to school districts in Washington State but in many cases the services are inadequate due to:

- ◆ Differences in need based on school district size.
- ◆ Districts unaware of the services offered and/or how to access services.
- ◆ A need for consultation services particularly in small- and medium-sized districts.
- ◆ A gap in planning and asset management services offered.

The graphic below again shows the facility services phases and includes the notation of where the most significant gaps, deficiencies, or barriers occur. As presented earlier, the greatest need for improvement in delivering these services is in the beginning (planning) and ending (asset management) phases. This provides the basis of developing recommendations for the development of a regional school construction technical assistance program.



Appendix A

A xibnqix v

**OSPI – Facility Services Gap Analysis
Interview Guide for School Districts**

OSPI has contracted with MGT to conduct a gap analysis of facility related services available to school districts in Washington. The following questions are intended to help in this analysis.

1. What facility related services do you currently provide with in-house staff?

2. Have you planned, designed, constructed, or renovated new or existing buildings in the last 5 years? 10 years?

3. If so, what was the program delivery method?

4. Have you received a state matching grant through the School Construction Assistance Program? Were there any problems, concerns or difficulties?

5. What facility related services have you received from OSPI?

6. What facility related services and/or funding sources would you like to receive in the future from OSPI?

7. Have you used any facility related services offered by Washington State Architectural and Engineering Services? What was the cost? How were they delivered? Were they satisfactory?

8. Have you used any facility related services offered by ESD 112's Construction Services Group? What was the cost? How were they delivered? Were they satisfactory?

9. Have you used any facility related services offered by a private company/firm? What was the cost? How were they delivered? Were they satisfactory?

10. Are there facility related services that you have needed and not been able to secure?

11. Does your district have any facility related health and safety issues?

12. Does your district have a complete facility inventory?

13. Does your district have any facility related asset management/preservation issues? Does your district have a maintenance plan, if so, how is it monitored?

14. Do you have a consultant or small works roster for the procurement of services?

15. Have you had any issues around passing a bond?

16. Are there any issues that we haven't discussed that you think are important for this study?

Appendix B

Appendix B

OSPI Data Collection

| Dist. No. | Size | Loc | Name | | Question | Response |
|-----------|------|-----|---|---|-------------------------------|---|
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5885 | 1 | Services with in-house staff? | Only maintenance and custodial services. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5886 | 2 | Construction/Remodeling? | 1998-99 two-room school at Beaver Valley. Replaced historic building moved to new site. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5887 | 3 | Program Delivery model? | Design, bid, build - local architect and engineer under contract with district |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5888 | 4 | State matching grant? | No. 1998 Beaver Valley built without bonding - annual payment of \$90,000 difficult for district. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5889 | 5 | OSPI services? | none. Would go for matching grant, if available. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5890 | 6 | OSPI future services? | Help with bonding process, construction management |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5891 | 7 | GA services? | none. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5892 | 8 | ESD 112 services? | none. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5893 | 9 | Private services? | none. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | | Question | Response |
|-----------|------|-----|---|----|--|--|
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5894 | 10 | Unavailable services? | none. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5895 | 11 | Health -safety facility issues? | Minor asbestos - just passed 3-year inspection. Older buildings have IAQ and air circulation issues. Some ADA access issues |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5896 | 12 | Complete facility inventory? | No. Have plans for each school and have annual maintenance list. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5897 | 13 | Asset management or preservation issues? | Have a maintenance plan and have been able to accomplish 80% as planned. Funding a problem, especially for major tasks. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5898 | 14 | Small works roster? | none |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5899 | 15 | Bond passing issues? | Last bond passed by 1 vote to build MS, bus barn and do renovations. Are considering a bond for this year to do major renovations on HS. Are concerned about the number of households without children and recent property tax increases that may affect voter interest in raising taxes further. |
| 228 | S | C | Cascade Dr. Rob Clark 509-548-5900 | 16 | Other? | The REM grant process is confusing. The district has applied for several years and has not received helpful feedback relative to their application and why it was not funded. There is a perception that the districts that ignore ongoing maintenance are those selected for support. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253- 571-1000 | 1 | Services with in-house staff? | Tacoma has 2 Project Managers on staff. One has an architecture background, the other engineering. They handle small capital projects as well as full construction. They have also hired outside consultants as needed, including Heery and Olympic, for specialty projects. When you hire a consultant, they go away at the "end" even though there are things that still happen with the project. It is better to have someone close who can be there in an on-going capacity. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | | Question | Response |
|-----------|------|-----|--|---|--------------------------|--|
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253-571-1001 | 2 | Construction/Remodeling? | They passed a bond for \$503 million in 2001 to build new, build additions, renovate or modernize 16 schools and do small capital projects on multiple sites. (See list for details.) |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253-571-1002 | 3 | Program Delivery model? | Design, bid, build,. except used GCCM for Lincoln and Stadium projects |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253-571-1003 | 4 | State matching grant? | Yes. They received state matching funds, except at Stafford ES new construction. There is very little money from the state and lots of rules and regulation to get it. The D-process is very time-consuming. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253-571-1004 | 5 | OSPI services? | None beyond the D-process. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253-571-1005 | 6 | OSPI future services? | None for Tacoma. However, the ESDs should be supporting the smaller districts who do not have the in-house staff. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253-571-1006 | 7 | GA services? | Mr. Burke was going to assist with the GCCM projects at Lincoln and Stadium. Tacoma couldn't get access to the staff they needed. GA needs to develop marketing materials to make clear what services are available. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253-571-1007 | 8 | ESD 112 services? | No. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | | Question | Response |
|-----------|------|-----|---|----|---|--|
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253- 571-1008 | 9 | Private services? | Yes. Tacoma has used private companies for services. The advantage is that you can get additional or different services if the individual assigned to the project isn't working out. The disadvantage is that they "go away" when the project ends and are not readily available should there be later issues. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253- 571-1009 | 10 | Unavailable services? | No. However, sometimes they cost more than you'd want to pay. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253- 571-1010 | 11 | Health -safety facility issues? | The older buildings have some issues - IAQ, ADA water, etc. Most are being addressed through the 2001 bond that included some small capital projects through 2010. Tacoma is concerned about the possible new WACS from the Health Department that will require certain lighting levels and certain noise levels for HVAC equipment. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253- 571-1011 | 12 | Complete facility inventory? | Yes. The Study and Survey |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253- 571-1012 | 13 | Asset management or preservation issues? | Yes. The Maintenance Department as a long-range plan, but emergencies prevail if there is a need for resources. |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253- 571-1013 | 14 | Small works roster? | Yes |
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253- 571-1014 | 15 | Bond passing issues? | Yes. Bond in 2007 failed. There was too much going on in the district, including some school closures planned. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | | Question | Response |
|-----------|------|-----|--|----|-------------------------------|---|
| 10 | L | W | Tacoma SD Pete Wall, Dir. Of Facilities 253-571-1015 | 16 | Other? | Districts need a long-range plan and steady stream of predictable funding for capital projects and asset management. The process currently used for bus reimbursement might be a model to explore for facility support. This would provide a reliable stream of funds for asset preservation and replacement on a predictable schedule. |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 1 | Services with in-house staff? | Only minor projects done in house. |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 2 | Construction/Remodeling? | Lincoln Middle School - new and renovation 4 years ago. Approx 10 years ago 3 elementary projects, 1 new 2 renovated |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 3 | Program Delivery model? | Traditional design - bid - build. ESD 112 was project manager |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 4 | State matching grant? | No state match on Lincoln - was used for previous elementary projects |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 5 | OSPI services? | Appreciated help getting through the D process from OSPI staff. However, process is seen as repetitive. OSPI staff are listening to districts and making a good effort |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 6 | OSPI future services? | |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|--|---|---|
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 7 GA services? | |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 8 ESD 112 services? | Utilized ESD 112 on the Lincoln project. They saved much more than their fee. Commissioning was remarkable, value engineering was outstanding. The staff could be counted on. Knew of ESD 112 services because former Supt was from that area. |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 9 Private services? | Boiler contracts, energy services, elevator contract |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 10 Unavailable services? | only as restricted by funding. Have project needs but can't afford to undertake them at this time. |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 11 Health -safety facility issues? | Nothing specific, high school is of an age that systems are beginning to fail. Difficult to keep environmental conditions correct. Drafts, hot to cold, etc. |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 12 Complete facility inventory? | have a complete capital asset inventory. Do not have room by room detail. |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 13 Asset management or preservation issues? | Preventative maintenance is an annual budget allotment. Currently developing policy and procedure. Need to have a better "look forward" but don't have the program to make that happen. If a model could be provided that would be a valuable resource. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|---------------------------------|---|
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 14 Small works roster? | Have one and it is kept current |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 15 Bond passing issues? | 5% bonding cap is a problem for this district. They tend to pass and need a new/renovated high school but are restricted by the cap. Construction costs are increasing faster than their bonding ability. |
| 267 | M | E | Pullman Paul Sturm, Supt., Dan Hornfelt, Support Serv. | 16 Other? | State assistance could be more creative - i.e. subsidize districts to state average, a break on costs to school districts, funding of services from ESD's. There are a number of efforts going on now that need to be coordinated - JLARC study, this study, 2% preventative maintenance, D process review. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 1 Services with in-house staff? | Nearly all done in-house. Developed 25 year long range plan in 2003, manage \$30 - 40 million per. Go outside for design services on large projects, in-house A & E manage smaller projects. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 2 Construction/Remodeling? | see above |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 3 Program Delivery model? | see above have hired Heery for GCCM |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|-------------------------|---|
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 4 State matching grant? | Last bond was \$165 million, utilized state match on eligible projects. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 5 OSPI services? | OSPI process forces school boards to be managers rather than policy makers. In district the size of Spokane they have staff with approval ability and should be able to sign off on OSPI forms. Possible consultants could be pre-qualified for small districts to use - speeding up the process. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 6 OSPI future services? | Greg is on the committee to review the D process. Should be streamlined, particularly for Districts that have on-going construction projects. Possibly pre-qualify districts that have proven their ability. Also, other agencies are sometimes dictating how schools construct / maintain buildings (department of health) possibly OSPI could coordinate and advocate - utilize their leadership with other state agencies. Multiple release dates for state funds would be a great improvement. Most school projects are bid in accordance with the release of funds - prices spike during that time. The process for skills center funding is difficult to understand. districts are not aware of the amount they will receive. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 7 GA services? | GA charges 4%, Spokane is at 2.5% |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|------------------------------------|--|
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 8 ESD 112 services? | Have interviewed ESD 112. Haven't used them because want to keep consulting services local. If ESD 101 offered those services they would look at that. Feel strongly that in-house project management gives us pride of ownership. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 9 Private services? | |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 10 Unavailable services? | Some very technical services - theater consultants, some independent testing, etc. EDS's and/or OSPI may be able to help. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 11 Health -safety facility issues? | Noting overwhelming. Have hired 2 specialists for indoor air quality. This is a service that could be provided by state or ESD's. Spokane spends \$100,000 of levy dollars annually to manage health/safety. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|---|--|
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 12 Complete facility inventory? | Yes, monitored by property management department. Don't have room by room inventory. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 13 Asset management or preservation issues? | have asset management plan |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 14 Small works roster? | yes, monitored by property management department. Don't have room by room inventory. |
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 15 Bond passing issues? | Spokane has had success with passing bonds |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|---------------------------------|--|
| 81 | L | E | Spokane Greg Brown - Cap. Projects Tim Wood - Operations Dir. Mark Anderson, Assoc. Supt. | 16 Other? | Are consistently getting rebates from AVISTA. District researches and applies for grants. Currently have \$850,000 in grants from OSPI on sustainability. Washington Policy Center has issued a report (white paper) that says green schools don't work. There is a need to refute. Spokane District spends a great deal on security with no funding source to offset the cost. Have spent over \$5 million of bond dollars on security systems. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3942 | 1 Services with in-house staff? | Maintenance Department only. The HS principal has experience in school construction. Have hired ESD 112 staff for support. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3943 | 2 Construction/Remodeling? | New ES under construction now for grades 4-6. Planning for new primary school. The Ed. Specs are being developed by a broad-based committee. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3944 | 3 Program Delivery model? | Started with ESD 112 support. Also used Olympia architect. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3945 | 4 State matching grant? | Yes for new Simpson ES to replace old school. Gordon Beck was very helpful and knowledgeable. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|-------------------------|---|
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3946 | 5 OSPI services? | Help with D-process and matching funds. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3947 | 6 OSPI future services? | The district does not want OSPI to require or direct the districts, except where there is funding involved. They would like support for long range planning, to develop a maintenance plan that can be proactive and prevent further decline in the facilities. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3948 | 7 GA services? | Never heard of them. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3949 | 8 ESD 112 services? | Yes. They are currently under contract with ESD 112 through an interlocal agreement with their own ESD 113. The costs are reasonable. They are very professional and helpful. They have provided site coordination and helped by managing the construction budget. Doug Nichols has been very helpful with the planning for the new primary school, slowing down the process and taking the time needed. However, they are far away in Vancouver. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3950 | 9 Private services? | The district has hired architects and engineers through a selection process. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|---|--|
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3951 | 10 Unavailable services? | Yes. The district needs a facility maintenance plan for long-term preservation. They received an Emergency Repair Grant and had to do a Facility Plan to get it, but this is an area of need. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3952 | 11 Health -safety facility issues? | There were many L and I claims last year related to facilities - outside walkways IAQ. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3953 | 12 Complete facility inventory? | The Study and Survey was updated 2 years ago to get state grants. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3954 | 13 Asset management or preservation issues? | This is an area of need for this district. They have a maintenance plan that identifies the tasks for daily, weekly, monthly and annual work, but it doesn't deal with preservation or system upgrades. The public is very concerned about "curb appeal" The district uses every available dollar to support faculties, but does not have a handle on the big picture into the future. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3955 | 14 Small works roster? | Currently updating. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | | Question | Response |
|-----------|------|-----|--|----|-------------------------------|---|
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3956 | 15 | Bond passing issues? | The district had to go to the voters twice to get the bond passed for the new Simpson ES. |
| 66 | S | W | Montesano Marti Harruff Superintendent 360-249-3957 | 16 | Other? | The district had no money to hire someone to help with facility planning before the bond was passed. They had an architect give them estimated costs, but this seems less than ideal - having an architect give estimated costs for a project he is hoping to work on. The district needs good cost estimates and needs them as part of a long-range plan for the whole district. Also, the timing and amount of the state match were problematic. The district feels it would be more helpful to know of the amount and the approval of state matching funds earlier in the year - January or February - so that plans can be ready for summer construction, rather than waiting a year for another construction season. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 1 | Services with in-house staff? | Only maintenance and custodial staff in house. New construction with support from Heery |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 2 | Construction/Remodeling? | 2007 - \$56.6 million bond for MS, ES additions and remodeling. Over last 10 years, additions and remodeling to CR |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 3 | Program Delivery model? | DBB Hired Heery to manage construction after the bond passed. Use outside A and E services |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|-------------------------|---|
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 4 State matching grant? | Yes. Tolt MS remodel in 2002, current - see HO for list of projects and funding. The problem is the state timelines and the lack of timely information about the amount of money available to the district. The timeline is not based on district/facility needs or even to changes in requirements (i.e., possible new Health Department regulations). |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 5 OSPI services? | There really aren't "services" available through OSPI. There is support for completing the state documents - the D process. Staff are very helpful and accommodating, especially Gordon Beck. The D process is very time consuming and complicated for very little funding. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 6 OSPI future services? | Not sure that school construction support is part of OSPI's mission. Probably better coming from the private sector. However, there should be state support for funding schools, but the process for getting state support needs to be streamlined. The process is too intrusive for little/no value added. Questions the administrative costs connected with the process compared to the actual value. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 7 GA services? | Yes. GA contract for energy study with a 3rd party engineering company. The district's state match funding would have been affected negatively by the upgrade to more energy efficient utilities. The district had to cancel contract and pay off the GA because it would have meant a loss of state matching funds. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 8 ESD 112 services? | No connection with 112. Heery (Project Managers) have written letter of complaint to OSPI, expressing concern that ESD 112 does not operate like a non-profit and is operating in competition with the private sector. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|---|---|
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 9 Private services? | Yes. District has hired Heery for current bond projects. A private individual was hired for earlier construction/remodeling projects. An example of unnecessary intrusion of state is the fact that the D process requires a copy of the contract with Heery be attached to one of the forms. There are many documents that have to be attached that are also checked by auditors, etc. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 10 Unavailable services? | No. If you can afford it, you can get services. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 11 Health -safety facility issues? | No. The bond is addressing the most pressing needs. However, there will be issues if the new Health Department regulations as understood by the district are enacted. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 12 Complete facility inventory? | Yes. The district completed the Study and Survey required by the D process. There is also a 6-year capital facilities plan that is updated annually. However, the plan describes capital funding plans, not on-going maintenance or preservation work. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 13 Asset management or preservation issues? | Yes. The funds for maintenance and especially landscaping compete for other general fund needs, including staff and instructional resources. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|---------------------------------|--|
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 14 Small works roster? | Yes. Use the small works roster and update it regularly. Also hire consultants using and RFQ process. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 15 Bond passing issues? | Recently have had good success, but anticipate difficulty again in the future, given the current economic picture. |
| 407 | S | W | Riverview Bill Adams, Bus. Mgr. and Project Management staff from Heery | 16 Other? | The district believes that the state match program is "regulatory enforcement of other jurisdictions' requirements." For example, through the D process, form D-7 requires a letter from agencies as documentation of compliance with requirements - Fire Department, City and County Planning Departments). Requiring a letter is redundant and puts the district at the mercy of local bureaucracy. Why not just attach a copy of the building permit? Other example includes required documentation of meeting prevailing wage rules which is also checked by SAO and labor and industry. The district is also concerned about the apparent lack of alignment in the timing of regulations and funding being available to address it. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 1 Services with in-house staff? | District Maintenance Department. Bus. Mgr. worked with local architect - BLRB to help with Study and Survey. Maint. Dept. has also worked with Bob McKensie - WSU Plant Operations when they needed to procure materials or services. Outstanding support for the district, especially with difficult issues. We currently provide electrical, plumbing, roofing, carpentry, cabinet building, HVAC, locksmithing, low voltage repair - fire, security,, pones, intercom and clock systems. We have a certified asbestos worker on staff and a playground safety inspector. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|--|----------------------------|--|
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 2 Construction/Remodeling? | 2003 - Jefferson ES. Of the 30 buildings in the district, 26 are 30+ years old. They have spent money over the years to maintain facilities, but have not upgraded systems like plumbing or electrical. We also built a new music building at Stevens MS and a gym addition at Roosevelt MS. The Stevens and Roosevelt projects were built without state matching funds. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 3 Program Delivery model? | Design, bid, build. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 4 State matching grant? | Yes, for Jefferson ES in 2003. I do not know of any difficulties. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 5 OSPI services? | Have contacted Gordon Beck. Have used BLRB Architects and a private bonding company working with a local, district committee to identify the priorities and the possible. The entire plan to renovate and modernize all schools would be \$150-\$220 million. He attended a course sponsored by OSPI on the School Construction Assistance Program. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|--|-------------------------|--|
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 6 OSPI future services? | Procurement support (like that from Bob McKensie - see #1). OSPI needs to be out at the ESD meetings to tell districts of the services and support they can provide. OSPI should be proactive, rather than waiting for districts to call and ask for help. OSPI should have a real time data base of school buildings so that they know which districts are eligible for matching funds and streamline the process for getting support. I would like to see a statewide preventative maintenance, maintenance tracking and utilities program for schools. That would enable data exchange between schools and easier reporting. If this was put out for bid at the state level, there would be a costs savings to each district. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 7 GA services? | NA |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 8 ESD 112 services? | No, but would explore support through the ESD if they pass the bond (now scheduled for 2011). Not clear on what services they provide. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 9 Private services? | Yes. (See #1) We are in the process of a study ;and survey provided by BLRB Architects. They have made several presentations to our Facilities/Bond Committee and have been great to work with to this point. We have used local architects for our non-bond related projects. I feel like we have gotten good service from them. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|--|--|--|
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 10 Unavailable services? | If you have the money, you can get the services. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 11 Health -safety facility issues? | Asbestos - have annual inspection. IAQ - have had to deal with some smoke damage from a fire. Have ADA issues on-going. We try to address any health and safety issues as soon as they arise. We also do a quarterly walk-through of all district buildings. At this time I do not know of any issues. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 12 Complete facility inventory? | Yes. Are in the process of conducting the Study and Survey with BLRB Architects. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 13 Asset management or preservation issues? | Yes. They have a plan, but not to the desired level of detail. Would like to have a 5-20-year plan that included a roof replacement schedule, flooring replacement, etc. as well as major system replacement. The current plan is monitored by the Maintenance Department. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|--|---------------------------------|---|
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 14 Small works roster? | Yes. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 15 Bond passing issues? | None recently, but anticipate may have some while trying to pass a bond in 2011 when the current study and committee work is finished. They had originally planned for bond in 2009, but board has postponed it, indicating that they have more pressing interest in a technology levy first. The last bond was passed on the third try; The district started out asking for \$15 million. When it didn't pass, the amount was lowered until \$9 million was approved. |
| 121 | S | W | Port Angeles Mark Jacobson, Bus. Mgr. 360-457-8575 Answers in blue are Nolan Duce, Maint. Director | 16 Other? | None. I would like to see the matching funds per square foot be more in line with actual costs and the allowable square footage be increased for school construction. |
| 501 | M | W | Bellingham Manuel Babying, Facilities Director 360-676-6501 | 1 Services with in-house staff? | The district has a full time Project and Facilities position that is staffed by a Washington licensed architect with significant school planning and construction experience. (See position responsibilities.). The district also has a Maintenance Department with licensed trades, carpenters, etc. The district hired outside providers as needed. |
| 501 | M | W | Bellingham Manuel Babying, Facilities Director 360-676-6502 | 2 Construction/Remodeling? | seven new or renovated buildings, five buildings with seismic remodeling |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | | Question | Response |
|-----------|------|-----|---|---|-------------------------|--|
| 501 | M | W | Bellingham Manuel Babying, Facilities Director 360-676-6503 | 3 | Program Delivery model? | design, bid, build |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6504 | 4 | State matching grant? | Yes, but only for Squalicum and Bellingham HS and Shuksan Middle School which were renovations/replacements. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6505 | 5 | OSPI services? | None |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6506 | 6 | OSPI future services? | OSPI has published a binder that describes the steps for completing the D-process. It would be helpful to have a flow chart or binder for the Study and Survey process. Since it's only done once in 6 years, district staff forget the process or they are new and have never been through the process. Also, the Study and Survey should be put into an electronic database so it can be accessed and used by both the district and the state. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6507 | 7 | GA services? | None. The district staff knew that it existed, but have not used it. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6508 | 8 | ESD 112 services? | None |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6509 | 9 | Private services? | Yes. For the Study and Survey, we hired an outside A and E firm. We use various legal firms as legal assistance for bonding. The district calls for bids for A and E firms to design buildings. They also hired consultants for specialty areas. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|---|---|---|
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6510 | 10 Unavailable services? | There is no support for non-instructional facilities, like bus garages or maintenance facilities. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6511 | 11 Health -safety facility issues? | The district has IAQ and ADA issues in older buildings. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6512 | 12 Complete facility inventory? | Yes. The Study and Survey was completed in 2007. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6513 | 13 Asset management or preservation issues? | The district does not currently use, but should take advantage of, the Study and Survey as a maintenance and management planning tool. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6514 | 14 Small works roster? | Yes, the small works roster is updated annually. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6515 | 15 Bond passing issues? | The district is very committed to involving the community in any bond question. There is always a citizen committee to review the needs and develop the plan. Getting out the vote and passing a bond levy is always fun. |
| 501 | M | W | Bellingham Manuel Babayan, Facilities Director 360-676-6516 | 16 Other? | The recently mandated Sustainability Protocols are problematic. These began as voluntary standards but are now mandatory to secure state matching funds. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|--|---------------------------------|---|
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2002 | 1 Services with in-house staff? | The district has Maintenance and custodial staff. It hires contractors to do big items. The remodeling and construction is done by outside contractors. On two recent facilities, the Business Manager served as Project Manager and worked with district staff to develop the Ed. Specs. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2003 | 2 Construction/Remodeling? | New HS - 2007, new ES 2001, remodel ES 1999 |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2004 | 3 Program Delivery model? | design, bid, build. District staff served as Project Manager. The HS started out to be a GCCM project, but could not agree on a price with the contractor. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2005 | 4 State matching grant? | Yes. The district received a matching grant for the HS. However, the timing was difficult and the district had to keep cutting building as the timelines were extended and the costs escalated with no increase in support. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2006 | 5 OSPI services? | Gordon Beck has been very responsive and helpful with the state matching funds program. The district is not clear what services are available from OSPI beyond the state match. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2007 | 6 OSPI future services? | The district believes that OSPI could provide dispute resolution services to help districts deal with problems between A and E and contractors and the district. The district would also like to have support for dealing with environmental issues - IAQ, HVAC, safe water, etc. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2008 | 7 GA services? | Yes. The district has used GA to help with the conversion of the JHS from electric to LNG. The cost was very reasonable and they provided good service. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|--|---|--|
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2009 | 8 ESD 112 services? | ESD 112 was invited to interview for the HS project. Not selected. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2010 | 9 Private services? | Yes. The district has issued an RFP for all projects and has had good response from the private sector. They have been very happy with Heery, the construction manager for the HS project. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2011 | 10 Unavailable services? | Yes. The Study and Survey is good, but it is too infrequent to keep up with needs. Since it's done on paper, it's not easily updated with work done at buildings between each 6-year data collection. The district also believes that the Emergency Repair Grants tend to go to districts that have been ignoring their own facility problems until they are in crisis. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2012 | 11 Health -safety facility issues? | Yes. The old schools have inadequate air exchanges. The ADA access is difficult in most of the older buildings. At one school after a remodel, there were leaks that caused mold on the interior. It did not become a public issue, but moisture and water are problems in the area. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2013 | 12 Complete facility inventory? | The district knows the number of buildings, the total sf, the construction of the roofs, etc. However, there is no complete and available listing identifying systems and providing prioritization of needs. The district has a 5-year Maintenance Plan, but some items never get to the top of the list because there is not sufficient funding. The list is mostly upkeep, not system replacement. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2014 | 13 Asset management or preservation issues? | The district knows that there are new state rules regarding the allocation of funds for maintenance of facilities, but it not clear on the details. Since education is the paramount duty of the state, the preservation of the educational facilities ought to be part of that obligation. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2015 | 14 Small works roster? | Yes. The district has both a small works roster and a list of consultants that they use regularly. |

OSPI Data Collection

| Dist. No. | Size | Loc | Name | Question | Response |
|-----------|------|-----|--|----------------------------|--|
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2016 | 15 Bond passing issues? | Historically, bonds in this district do not ever pass the first time. They are typically scaled back and usually pass later. |
| 5 | S | W | Aberdeen SD Marty Kay, Superintendent 360-538-2017 | 16 Other? | Need for dispute resolutions support, ADA support, maintenance planning. |

Appendix C

Appendix C

**OSPI – Facility Services Gap Analysis
Interview Guide for Service Providers**

OSPI has contracted with MGT to conduct a gap analysis of facility related services available to school districts in Washington. The following questions are intended to help in this analysis.

1. What facility related services do you currently provide to school districts?

2. How do you deliver these services?

3. What problems do you encounter in delivering these services?

4. Do you deliver these services in all areas of the state?

5. Do you offer these services to all districts regardless of size?
 - Do you charge for the services that you provide to school districts?
 - If so, have you found that the fees prohibit some school districts from receiving the services?

6. Do you see a need for other services? If so, why don't you offer them?

7. What are some of the most common needs districts have in the facilities area?

8. Are there any other issues that should be addressed in this study?

Appendix D

Appendix D

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|--------------|------------|--|--|---|
| 105 | C | ESD 105 Dr. Dave Curry 509-575-2885 | 1 Facility services provided? | None officially. Provide lots of informal assistance with fiscal issues, including bond questions, etc., but no support for planning and construction. No districts in ESD use 112 for support. |
| 105 | C | ESD 105 Dr. Dave Curry 509-575-2886 | 2 How deliver services? | NA |
| 105 | C | ESD 105 Dr. Dave Curry 509-575-2887 | 3 Problems delivering? | NA |
| 105 | C | ESD 105 Dr. Dave Curry 509-575-2888 | 4 Deliver in all areas? | NA |
| 105 | C | ESD 105 Dr. Dave Curry 509-575-2889 | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | Would be willing to provide support to any district in service area. |
| 105 | C | ESD 105 Dr. Dave Curry 509-575-2890 | 6 Need for other services? | Yes. There is a potential for cooperative efforts and some possible efficiencies if two districts were planning and building on the same timeline. This might be difficult to weigh against the autonomy of individual districts and school boards, but might result in cost savings. The superintendents meet monthly so have opportunities to discuss their plans and needs. |
| 105 | C | ESD 105 Dr. Dave Curry 509-575-2891 | 7 Most common needs? | Districts, like White Swan, have huge facility needs, but have difficulty passing bonds because of tax base, etc. They have huge needs and could benefit from some state support. Also, the ESDs get no support from the state for any facilities - buying, building, or remodeling. The costs for facilities must be borne out of operating expenses which means the ESD has to charge the districts more for the services provided. |
| 105 | C | ESD 105 Dr. Dave Curry 509-575-2892 | 8 Other? | The design, bid, build process works fine. The GCCM process is not transparent enough and there may be too many decisions made on behalf of the district that the district would not have chosen to make. |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|---|---|--|
| 101 | E | ESD 101 Michael Dunn, Supt. Eric Dickson, Industrial Hygienist Terry Groh, Supervisor Paul Boyd, Risk Mgr. | 1 Facility services provided? | Only direct service is indoor air quality. One ESD 112 employee is housed in ESD 101 to provide facility services in the area (Cooley, Othello, Chewelah, Valley). |
| 101 | E | ESD 101 Michael Dunn, Supt. Eric Dickson, Industrial Hygienist Terry Groh, Supervisor Paul Boyd, Risk Mgr. | 2 How deliver services? | Indoor air quality provided by one staff member who travels to districts. Facility through the ESD 112 staff member |
| 101 | E | ESD 101 Michael Dunn, Supt. Eric Dickson, Industrial Hygienist Terry Groh, Supervisor Paul Boyd, Risk Mgr. | 3 Problems delivering? | Time and distance |
| 101 | E | ESD 101 Michael Dunn, Supt. Eric Dickson, Industrial Hygienist Terry Groh, Supervisor Paul Boyd, Risk Mgr. | 4 Deliver in all areas? | Indoor air quality person serves all district in ESD 101 except Spokane and 3 District in ESD 123 |
| 101 | E | ESD 101 Michael Dunn, Supt. Eric Dickson, Industrial Hygienist Terry Groh, Supervisor Paul Boyd, Risk Mgr. | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | Offer all services on a fee basis |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|--------------|------------|---|----------------------------------|---|
| 101 | E | ESD 101 Michael Dunn, Supt. Eric Dickson, Industrial Hygienist Terry Groh, Supervisor Paul Boyd, Risk Mgr. | 6 Need for other services? | Maintenance planning, Facility evaluation services, Energy audits |
| 101 | E | ESD 101 Michael Dunn, Supt. Eric Dickson, Industrial Hygienist Terry Groh, Supervisor Paul Boyd, Risk Mgr. | 7 Most common needs? | Districts sometimes pay too much for facility related services. ESD's could serve as a mediator, Have agreements established with providers (HVAC, Roofing, etc.) Also there is a need for an advocate for the school districts - help navigate through the process. Possibly WAMOA could be involved. |
| 101 | E | ESD 101 Michael Dunn, Supt. Eric Dickson, Industrial Hygienist Terry Groh, Supervisor Paul Boyd, Risk Mgr. | 8 Other? | OSPI releases funds for new construction projects in March or April. This means projects can't start until summer, so the dirt work is done during the warm, dry weather. By the time projects start going vertical (walls, floors, roofing, etc.) it's getting into the wet winter season where they are dealing with rain and/or snow. Trying to keep building materials dry is very difficult in wet weather. The potential for weakened building materials increases as does the potential for these materials becoming moldy during this time of year. This frustrates superintendents as well as maintenance departments. Possibly OSPI can review/change their policy about when to release funds for construction projects to allow the critical portions of construction to be done during the warm, dry part of the year. District very much appreciates the small repair grants |
| 113 | W | ESD 113 Olympia Bill Keim, Superintendent 360-464-6700 | 1 Facility services provided? | Yes through a partnership with ESD 112. They have a written interlocal agreement for the last 3 years. They provide office space for the staff from ESD 112 when they come to work with districts. The required knowledge and levels of expertise are beyond what staff at 113 can provide. They do have an Asbestos Cooperative Agreement and write an RFP to secure needed services for inspection for districts involved. |
| 113 | W | ESD 113 Olympia Bill Keim, Superintendent 360-464-6701 | 2 How deliver services? | NA |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|--|---|---|
| 113 | W | ESD 113 Olympia Bill Keim, Superintendent 360-464-6702 | 3 Problems delivering? | The Asbestos Cooperative may not be completely known to all the districts or the costs may be prohibitive. |
| 113 | W | ESD 113 Olympia Bill Keim, Superintendent 360-464-6703 | 4 Deliver in all areas? | NA |
| 113 | W | ESD 113 Olympia Bill Keim, Superintendent 360-464-6704 | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | Asbestos Cooperative - offered to all, but all may not know. The costs are based on SF. The cost may be difficult for some districts so they may not choose to participate. |
| 113 | W | ESD 113 Olympia Bill Keim, Superintendent 360-464-6705 | 6 Need for other services? | Need clarity on the new WAC/RCW regarding the need for districts to spend a % of the replacement cost for the maintenance of the buildings. Many districts do not have a process or the resources to track maintenance funds spent. The ESD doesn't have the resources either. Vader SD ;had to consolidate with Castle Rock over a facilities issue - double levy failure and a facility that the county condemned. They had to pass a levy to get a balanced budget had to pass a bod to get a new building, but both failed. |
| 113 | W | ESD 113 Olympia Bill Keim, Superintendent 360-464-6706 | 7 Most common needs? | More information about support available. For example, what support is available through ESD 112? What support is available through GA? Does OSPI provide more than guidance on how to complete the D series. |
| 113 | W | ESD 113 Olympia Bill Keim, Superintendent 360-464-6707 | 8 Other? | There is no facility support for ESDs. The only way to house the program and expand is to charge back to the districts. If there is a state interest in providin support to the districts, then the state should provide support for ESD facilities. |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|--------------|------------|---|---|--|
| 189 | W | ESD 189 Northwest Jerry Jenkins, Superintendent 360-299-4003 | 1 Facility services provided? | Partnership with ESD 112 using 189 staff member and other shared staff from 112 to support school facility planning and construction in 5 districts - Marysville, Ferndale, Coupsville, Lake Stevens, Lynden. |
| 189 | W | ESD 189 Northwest Jerry Jenkins, Superintendent 360-299-4004 | 2 How deliver services? | The 189 employee is a Project Manager. He is under the direction of ESD 112 and uses other 112 support as needed. |
| 189 | W | ESD 189 Northwest Jerry Jenkins, Superintendent 360-299-4005 | 3 Problems delivering? | How to maintain staff at 189 if there are no districts needing services for a period of time. |
| 189 | W | ESD 189 Northwest Jerry Jenkins, Superintendent 360-299-4006 | 4 Deliver in all areas? | Only this ESD region. |
| 189 | W | ESD 189 Northwest Jerry Jenkins, Superintendent 360-299-4007 | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | Yes. Dr. Jenkins visits districts that are considering a building program to make them aware of support and services available through ESD 189 and partnership with ESD 112. The fees cover the general project management costs, not specialty areas like wetland mitigation. |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|--|-------------------------------|---|
| 189 | W | ESD 189 Northwest Jerry Jenkins, Superintendent 360-299-4008 | 6 Need for other services? | Concern for lack of facility funds that increase the amount of maintenance that is deferred and may lead to a reduction in the lifetime of a facility. There are some potential service areas where economy could be achieved - i.e., window replacement or other energy saving areas. Facility issues and support is a huge need in districts of <4000 because they are not large enough to hire district staff for facility construction management. The ESDs should provide the safety net and support for these districts. The role of the ESDs is support and service. The role of OSPI is compliance. However, the legislature should not require districts to use ESD support. |
| 189 | W | ESD 189 Northwest Jerry Jenkins, Superintendent 360-299-4009 | 7 Most common needs? | deferred maintenance due to lack of funds |
| 189 | W | ESD 189 Northwest Jerry Jenkins, Superintendent 360-299-4010 | 8 Other? | |
| 171 | C | ESD 171 North Central Rich McBride, Superintendent 509-665-2610 | 1 Facility services provided? | Districts in this region access the Construction Services Group from ESD 112 through an interlocal agreement. ESD 171 provides office space for 112 staff, as needed. |
| 171 | C | ESD 171 North Central Rich McBride, Superintendent 509-665-2611 | 2 How deliver services? | Interlocal agreement |
| 171 | C | ESD 171 North Central Rich McBride, Superintendent 509-665-2612 | 3 Problems delivering? | None |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|--|--|--|
| 171 | C | ESD 171 North Central Rich McBride, Superintendent 509-665-2613 | 4 Deliver in all areas? | Yes |
| 171 | C | ESD 171 North Central Rich McBride, Superintendent 509-665-2614 | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | Yes offered to all districts, regardless of size. Yes, there are fees for services. Not aware of any districts not selecting ESD 112 because of cost. Districts typically request bids for projects and 112 is invited to bid. Some districts choose to use other services for reasons including previous experience with a contractor, loyalty or a relationship with another, but not price or reputation or expertise. |
| 171 | C | ESD 171 North Central Rich McBride, Superintendent 509-665-2615 | 6 Need for other services? | None identified |
| 171 | C | ESD 171 North Central Rich McBride, Superintendent 509-665-2616 | 7 Most common needs? | Districts need support for school construction/facilities. Information about Service Providers - There are new superintendents or new facility needs and they don't know where to get information. What support does OSPI have? What support can GA provide? What's available through ESD? Information about best practices - What are the best roofing systems? HVAC, plumbing, etc.? Can these be available on a state-wide purchase program so each district doesn't have to "discover" about these or make the wrong decision based on short-term costs because they don't know the long-term implications? Model plans or specifications - Can there be state-approved school plans or parts of plans (i.e., classroom interiors, gymnasium with bleachers and locker rooms, cafeteria and kitchens) for various sized schools and various levels that districts can use as a starting point to reduce cost and approval time? Knowledgeable People with Good Information - Could there be a person in each ESD region who is aware of the facility needs in the area and available to help districts address them? Could there be a state-wide electronic database of facilities that has inventory, condition, etc. so that policy-makers can know and monitor facilities, ESDs can provide support to clusters of districts based on common needs, and districts can continuously track and monitor facility needs and issues. |
| 171 | C | ESD 171 North Central Rich McBride, Superintendent 509-665-2617 | 8 Other? | |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|--|--|--|
| 114 | W | ESD 114 Bremerton Walt Bigby, Superintendent 360-479-0993 | 1 Facility services provided? | This ESD serves as a "storefront" for the Construction Services Group at ESD 112. They have an interlocal agreement to allow districts in the region access to the ESD services. However, not all districts use that service. Bremerton SD bid their project and selected Heery based on previous experience and relationship. |
| 114 | W | ESD 114 Bremerton Walt Bigby, Superintendent 360-479-0994 | 2 How deliver services? | Through interlocal agreement. |
| 114 | W | ESD 114 Bremerton Walt Bigby, Superintendent 360-479-0995 | 3 Problems delivering? | None |
| 114 | W | ESD 114 Bremerton Walt Bigby, Superintendent 360-479-0996 | 4 Deliver in all areas? | As requested by districts |
| 114 | W | ESD 114 Bremerton Walt Bigby, Superintendent 360-479-0997 | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | Yes |
| 114 | W | ESD 114 Bremerton Walt Bigby, Superintendent 360-479-0998 | 6 Need for other services? | Yes. Districts could use help with "value engineering." New superintendents or superintendents with no facility experience would benefit from support and information. Bob Manetti and Gordon Beck at OSPI have provided terrific support for districts. They saw their mission to help the districts be successful. |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|--------------|------------|---|-------------------------------|---|
| 114 | W | ESD 114 Bremerton Walt Bigby, Superintendent 360-479-0999 | 7 Most common needs? | Most districts need help and could benefit from assistance as they develop long-range plans and then create a bond election question for the voters. They could benefit from help in engaging their community in the discussions about facility needs, surveying the community about willingness to support facility needs, best practices in developing a bond proposal, etc. This service might best be provided at the ESDs, which are closer to the districts than OSPI. |
| 114 | W | ESD 114 Bremerton Walt Bigby, Superintendent 360-479-1000 | 8 Other? | ESD facilities are not funded so the costs must be passed to the regional districts. |
| 121 | W | ESD 121 Puget Sound Monty Bridges, Superintendent 253-776-7601 Joe Tile, Director of Workers' Compensation Co- op | 1 Facility services provided? | The ESD has three types of facility services. They have: an interlocal agreement with ESD 112. They have several districts which have chosen to contract for their services - Stillacom, Shoreline, University Place, Orting. They also have a Workers' Compensation Program that has a strong facilities component. They review existing facilities for IAQ and science lab safety, trying to identify and improve the facilities before they become claims. The workers' compensation group also provide support for districts building new or remodeling spaces to ensure that they follow best practices relative to IAQ and safety. Finally, they also provide custodial and maintenance efficiency/effectiveness reviews for districts. |
| 121 | W | ESD 121 Puget Sound Monty Bridges, Superintendent 253-776-7601 Joe Tile, Director of Workers' Compensation Co- op | 2 How deliver services? | For the ESD 112 contracts, they serve as support and offer office space for visiting staff, as needed and requested by a district. The other services are delivered directly to all districts in the ESD |
| 121 | W | ESD 121 Puget Sound Monty Bridges, Superintendent 253-776-7601 Joe Tile, Director of Workers' Compensation Co- op | 3 Problems delivering? | None |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|---|---|---|
| 121 | W | ESD 121 Puget Sound Monty Bridges, Superintendent 253-776-7601 Joe Tile, Director of Workers' Compensation Co- op | 4 Deliver in all areas? | Yes |
| 121 | W | ESD 121 Puget Sound Monty Bridges, Superintendent 253-776-7601 Joe Tile, Director of Workers' Compensation Co- op | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | Yes. Districts pay a premium based on cost/hour for the Workers' Compensation program, but their other choice is to enroll through the state's self-insurance program, since one or the other is mandatory. The ESD program provides better services for the fee charged. |
| 121 | W | ESD 121 Puget Sound Monty Bridges, Superintendent 253-776-7601 Joe Tile, Director of Workers' Compensation Co- op | 6 Need for other services? | Support for districts that are facing declining enrollments and need to reduce inventory of buildings. How do they approach the task, develop the plan? How work with cocmmunity? How communicate? Districts need help connecting their instructional strategic plans to facilities. They need ways to connect program to buildings, including capacity and utilization issues. Districts need help to plan and design the most efficient and effective buildings based on energy and management reviews. |
| 121 | W | ESD 121 Puget Sound Monty Bridges, Superintendent 253-776-7601 Joe Tile, Director of Workers' Compensation Co- op | 7 Most common needs? | Support for districts that are facing declining enrollments and need to reduce inventory of buildings. How do they approach the task, develop the plan? How work with cocmmunity? How communicate? Districts need help connecting their instructional strategic plans to facilities. They need ways to connect program to buildings, including capacity and utilization issues. Districts need help to plan and design the most efficient and effective buildings based on energy and management reviews. |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|---|-------------------------------|--|
| 121 | W | <p>ESD 121 Puget Sound Monty Bridges, Superintendent 253-776-7601 Joe Tile, Director of Workers' Compensation Co- op</p> | 8 Other? | The ESD belongs to the GA consortium. Through the GA, they can access services, products, advise, and information for districts, as needed. However, the availability of these services is not widely known to districts. Given the turnover at the district administration level and at GA and OSPI, there is a need for information and contacts on a regular basis. |
| 112 | C | <p>ESD 112 Vancouver Twyla Barnes, Superintendent 360-750-7500 Doug Nichols Director, CSG</p> | 1 Facility services provided? | ESD112 Answer Question 1.doc |
| 112 | C | <p>ESD 112 Vancouver Twyla Barnes, Superintendent 360-750-7500 Doug Nichols Director, CSG</p> | 2 How deliver services? | These services are delivered through a cooperative arrangement between ESD 112 and other ESDs or directly to districts in the ESD 112 region. CSG provides qualified staffing and expertise to support school districts within the region. For other ESDs, they provide staff to that geographic area. |
| 112 | C | <p>ESD 112 Vancouver Twyla Barnes, Superintendent 360-750-7500 Doug Nichols Director, CSG</p> | 3 Problems delivering? | None identified |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|---|---|---|
| 112 | C | ESD 112 Vancouver Twyla Barnes, Superintendent 360-750-7500 Doug Nichols Director, CSG | 4 Deliver in all areas? | ESD 112 serves all districts in their region. The CSG provides these services statewide in partnership with the eight other ESDs. |
| 112 | C | ESD 112 Vancouver Twyla Barnes, Superintendent 360-750-7500 Doug Nichols Director, CSG | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | Yes. Services are offered regardless of size. Yes. There is a fee for services. Yes some districts cannot afford to participate. Services that are ineligible for bond funding or are not mitigated by state funding assistance are less likely to be affordable, especially for smaller districts. These services include: Development reviews, impact fee ordinances, capital facilities plans; Community attitudinal surveys and other activities in support of bond passage; Energy conservation programs; Management of small projects not funded by bonds or state funding assistance; Maintenance and operations planning and execution. |
| 112 | C | ESD 112 Vancouver Twyla Barnes, Superintendent 360-750-7500 Doug Nichols Director, CSG | 6 Need for other services? | Yes. Services relating to facilities maintenance and operations are conspicuously needed by many districts. These services include basline facility assessments, long range maintenance planning and ongoing facility maintenance monitoring. These services are not widely offered because many district cannot afford them and don't understand their long term value in terms of facilities enhancement and value retention. |
| 112 | C | ESD 112 Vancouver Twyla Barnes, Superintendent 360-750-7500 Doug Nichols Director, CSG | 7 Most common needs? | Pre-bond services Bond program,, project and construction management Fiscal management of construction projects maintenance and operations planning and ongoing management |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|---|---|--|
| 112 | C | ESD 112 Vancouver Twyla Barnes, Superintendent 360-750-7500 Doug Nichols Director, CSG | 8 Other? | Already described under #6. |
| | C | GALCo Engineering Services Olympia Gary A. Larson, P.E. 360-491-7591 | 1 Facility services provided? | GALCo offers project management services to smaller districts. This is largely a one man operation. Mr. Larson likes to be involved from the start, before the architect is selected, through close-out. He also can perform civil engineering services, but only does so on a very limited basis. |
| | C | GALCo Engineering Services Olympia Gary A. Larson, P.E. 360-491-7591 | 2 How deliver services? | He delivers the services on a consultant contract. |
| | C | GALCo Engineering Services Olympia Gary A. Larson, P.E. 360-491-7591 | 3 Problems delivering? | The biggest problem is with a lack of communication and responsiveness from A&E consultants. OSPI is a great support. Local jurisdictions can be difficult, there is often a backlog in the permitting process. It can sometimes be difficult to get school staff involvement. |
| | C | GALCo Engineering Services Olympia Gary A. Larson, P.E. 360-491-7591 | 4 Deliver in all areas? | He works mostly in the south sound, around Olympia. |
| | C | GALCo Engineering Services Olympia Gary A. Larson, P.E. 360-491-7591 | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | He prefers smaller districts. He usually charges a negotiated fixed fee. Not in his experience, he usually saves a district money. |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|--------------|------------|--|----------------------------------|--|
| | C | GALCo Engineering Services Olympia Gary A. Larson, P.E. 360-491-7591 | 6 Need for other services? | None, he is glad to see that commissioning has come about. |
| | C | GALCo Engineering Services Olympia Gary A. Larson, P.E. 360-491-7591 | 7 Most common needs? | The most common need is adequate staff time for planning and supervision. Two phase value engineering is needed, once at preplanning and once at design development. |
| | C | GALCo Engineering Services Olympia Gary A. Larson, P.E. 360-491-7591 | 8 Other? | He likes to see the design architect do the educational specifications, it brings them closer to the project. Districts really need to think through the scheduling and phasing of a project. |
| | C | Olympic Associates Seattle Daniel J. Chandler, PE, AIA 206 674-6103 | 1 Facility services provided? | Olympic Associates is an A&E firm of 75 employees. 60 to 70% of its work is project management. About 30% of its practice is with schools in project (construction) management. It doesn't do any design work for schools. It also offers Value Engineering, constructibility reviews, commissioning, building envelope consulting and forensics, and planning (should a district build new or renovate?). |
| | C | Olympic Associates Seattle Daniel J. Chandler, PE, AIA 206 674-6103 | 2 How deliver services? | They typically get work through RFP's and work as a consultant to the district. |
| | C | Olympic Associates Seattle Daniel J. Chandler, PE, AIA 206 674-6103 | 3 Problems delivering? | No systemic problems, just typical construction project issues. |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|--------------|------------|---|---|--|
| | C | Olympic Associates Seattle Daniel J. Chandler, PE, AIA 206 674-6103 | 4 Deliver in all areas? | They also have a Spokane office and work all over the state. |
| | C | Olympic Associates Seattle Daniel J. Chandler, PE, AIA 206 674-6103 | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | They will work with all size districts, but the second tier districts, such as Everett and Pullayup, are their best markets. Project management is on an hourly basis with a not to exceed amount. Fee varies with scope of services. VE, constructibility, and commissioning is lump sum depending on size of project. |
| | C | Olympic Associates Seattle Daniel J. Chandler, PE, AIA 206 674-6103 | 6 Need for other services? | No. |
| | C | Olympic Associates Seattle Daniel J. Chandler, PE, AIA 206 674-6103 | 7 Most common needs? | Small districts need help knowing what services they need, they don't know what they don't know. |
| | C | Olympic Associates Seattle Daniel J. Chandler, PE, AIA 206 674-6103 | 8 Other? | None |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|--|-------------------------------|---|
| | C | <p>General Administration Olympia John Lynch Assistant Director Division of Engineering and Architectural Services 360 902-7271</p> | 1 Facility services provided? | <p>GA offers project management services to other governmental entities. By charter, they are obligated to provide these services to Community Colleges, Corrections, and DSHS. Since these clients have historically kept them busy, they have not marketed to school districts for project management. These services include VE, constructibility reviews, and commissioning by private consultants. GA provides contact managers and dispute resolution.</p> <p>They do offer plant operations support services through a consortium of governmental entities which includes approximately 50 school districts, some of which are Canadian. Consultive or support services are provided on smaller plant operation or maintenance issues.</p> <p>GA also offers performance contracting for energy conservation. They act as the project manager for the client, and provide contracts and specifications.</p> <p>GA reviews all energy life cycle cost analyses which must be prepared for all state projects. The analysis is typically done by a private engineer.</p> |
| | C | <p>General Administration Olympia John Lynch Assistant Director Division of Engineering and Architectural Services 360 902-7271</p> | 2 How deliver services? | <p>Community colleges, corrections, and DSHS have to have a GA project manager for capital projects. Other entities can contact GA for other services. They have responded to RFP's infrequently.</p> |
| | C | <p>General Administration Olympia John Lynch Assistant Director Division of Engineering and Architectural Services 360 902-7271</p> | 3 Problems delivering? | <p>The delivery of services can be complicated when GA works with a new entity and neither group is familiar with the procedures of the other.</p> |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|--------------|------------|--|---|--|
| | C | General Administration Olympia John Lynch Assistant Director Division of Engineering and Architectural Services 360 902-7271 | 4 Deliver in all areas? | Yes, all over the state and in Alaska, Oregon and Canada. |
| | C | General Administration Olympia John Lynch Assistant Director Division of Engineering and Architectural Services 360 902-7271 | 5 Offer, regardless of size? Charge for services? Do fees prohibit district participation? | GA has not really provided project management services to school districts. They do provide the other services to all sizes of districts. GA has a fee schedule for project management. The fee is a percent of the total project cost and varies with the project size. The average fee is 1.8%. |
| | C | General Administration Olympia John Lynch Assistant Director Division of Engineering and Architectural Services 360 902-7271 | 6 Need for other services? | GA feels that districts could get more value by using performance contracting to accomplish some renovations. They have worked with 50-60 districts in the last four years. GA is currently working with OSPI to develop sustainable standards. GA has a small works roster that is available to other agencies. |
| | C | General Administration Olympia John Lynch Assistant Director Division of Engineering and Architectural Services 360 902-7271 | 7 Most common needs? | GA has procedures to ensure the client get the most competent contractor and not just the lowest bidder. |

OSPI Data Collection

| ESD # | Loc | Contact | Question | Response |
|-------|-----|---|----------|----------|
| | C | General Administration Olympia John Lynch Assistant Director Division of Engineering and Architectural Services 360 902-7271 | 8 Other? | None |

- Pre-Bond services
 - Facilities survey and study to OSPI requirements
 - Community attitudinal surveys
 - Master bond budgeting
 - Master bond scheduling
 - Bond strategies
 - Community ;meetings facilitation
 - Bond public information and graphics
- Post-Bond/Pre-Design
 - Educational specifications to OSPI requirements
 - Design team selection facilitation
- Design Period Services
 - Budgeting/cost management
 - Schedule management
 - Value analysis studies to OSPI requirements
 - Constructability studies to OSPI requirements
 - OSPI compliance
- Construction Period Services
 - Project cost management
 - Project schedule management
 - On-site construction quality monitoring
 - Building commissioning to OSPI requirements
 - Management of separate owner contractors/vendors/consultants
 - OSPI compliance
- Post-Construction Services
 - Warranty management and 1-year walk through
- Other Facility Services
 - Development reviews, impact fee ordinances, capital facilities plans
 - Assistance with SEPA lead agency status
 - Coordination of furnishings and equipment purchases
 - Management of logistics for moving
 - Administration of small works process
 - Energy conservation programs

- Pre-Bond services
 - Facilities survey and study to OSPI requirements
 - Community attitudinal surveys
 - Master bond budgeting
 - Master bond scheduling
 - Bond strategies
 - Community ;meetings facilitation
 - Bond public information and graphics
- Post-Bond/Pre-Design
 - Educational specifications to OSPI requirements
 - Design team selection facilitation
- Design Period Services
 - Budgeting/cost management
 - Schedule management
 - Value analysis studies to OSPI requirements
 - Constructability studies to OSPI requirements
 - OSPI compliance
- Construction Period Services
 - Project cost management
 - Project schedule management
 - On-site construction quality monitoring
 - Building commissioning to OSPI requirements
 - Management of separate owner contractors/vendors/consultants
 - OSPI compliance
- Post-Construction Services
 - Warranty management and 1-year walk through
- Other Facility Services
 - Development reviews, impact fee ordinances, capital facilities plans
 - Assistance with SEPA lead agency status
 - Coordination of furnishings and equipment purchases
 - Management of logistics for moving
 - Administration of small works process
 - Energy conservation programs

