



BUSINESS FINANCE

Construction Procedures



G-PISD

Construction Procedures

Version 1.0 – July 2022

Office of Business and Finance

Gregory-Portland ISD
Gregory, Texas
Portland, Texas

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Section 1 - Mission, Vision, Method, Role & Process

MISSION

The District's mission statement reads as follows:

"The mission of G-PISD is to educate, inspire, and empower our students to succeed in life and become the next generation of leaders."

The Construction Department G-PISD is responsible for the oversight of all construction and capital improvements of facilities within the district. These projects are typically funded from Bond Funds approved by the voters of the District. To achieve the goals and mission of the district, the department offers planning, programming, design, construction, commissioning, inspection services, and warranty management in accordance with the design and construction standards (internal and external) and this manual. This department also manages the move-in process including the coordination of the furniture, fixtures, and equipment (FF&E) with the project team and schedule along with the overall project closeout process to ensure compliance with the contract documents.

VISION

The Construction Department of G-PISD aspires to achieve excellence while delivering the best value to the students, staff, and community in support of the District's vision to educate, inspire, and empower - by creating the highest quality educational learning environment possible. Our team endeavors to provide responsible and quality stewardship for the long-term preservation and growth of our district's physical assets through the unified delivery of planned projects, while remaining cost-effective and competitive.

METHOD

This procedure manual is our commitment to excellence and was developed with input from members of the construction team and district administration for compliance with applicable board policies, administrative regulations, and state statutes. This procedure manual is a tool to provide consistent project delivery and to serve as a road-map for successful cost, schedule, and quality performance on projects.

Extensive research was conducted to review the current processes versus benchmarked processes at similar school districts. Critical Success Factors developed during this research were as follows:

- Be Transparent
- Be Measurable
- Define Levels of Authority
- Define Department to Department Interaction

- Be Non-obstructive to our clients
- Project definition, scope schedule, and cost
- Define sign-offs, accountability, and funding sources
- Support internal and external audits
- Integrate with the Curriculum and Instruction Department with academic planning
- Be intuitive and simple and allow for efficient execution
- Department buy-in from the ground up
- Policy definition: real versus perception
- Who does my project affect?

Best practices were evaluated based upon industry standards and the following were included within our processes and procedures in this manual.

- Partnering with a Project Team during pre-construction meetings to establish project expectations
- Schedule optimization by developing schedule templates as well as a training program for appropriate staff and administrators.
- [TX –CHPS](#), Collaborative for High-Performance Schools
- Constructibility Reviews are incorporated within the quality control processes
- Inspection processes to ensure quality construction from the construction team
- Commissioning of the projects through the use of outside consultants and under management of the construction department
- Transition, Activation, and Closeout Procedures and checklists that will facilitate effective planning of the phase for move-in
- Lessons learned process to ensure that a continuous learning cycle is applied to building planning and construction

Implementation of these methods created this manual and consistent implementation of these processes will result in a reduction of overall project risk and cost to the district with a successful means to meet the needs of the students and staff.

ROLE

In direct alignment with all aspects of district **PRIORITY 4 - Efficient and Effective District and Campus Operations**, the role of the Construction department is to drive capital construction projects, funded primarily by bond authorizations by the voters to completion, and to manage capital improvement projects, funded via fund balance or general funds. The department will achieve this while consistently exemplifying G-PISD core values of excellence in response to the cultural challenges affecting the quality of life in the Coastal Bend area and the G-PISD community, the State of Texas and the world through education research and professional service.



PROCESS

This manual is a road map for delivering a successful project in a very consistent manner no matter what personnel is assigned to the project. It has been developed as a tool to facilitate communication and expectations between the Construction Department, our End Users/Clients, and our project team members including Architects, Engineers, General Contractors, and other support departments and service providers for successful project implementation. The goal is to provide a life cycle program that incorporates a continuous improvement methodology to deliver successful projects including initiation, planning, construction execution, closeout, reflection and feedback of all capital construction and improvement.

This manual will promote transparency, standardization, and understanding of the project delivery process, which will result in a more cohesive effort, client satisfaction, and an improved final product to promote the highest-quality learning environment for the students we serve in Gregory-Portland ISD.

Section 2 – Introduction and Directory

This guide outlines departmental duties and suggested procedures to follow in performing the design and management duties on capital improvement and construction projects.

The procedures in this manual are not intended to describe the only method of achieving our service goals but is designed as a road-map for success.

The following is the listing of the current approved staff and positions along with the current contact information for the Construction Department:

Gregory-Portland ISD Construction Department Staffing

The following **Exhibit 2.1** shows the organizational chart for the Facilities and Construction Department for reference.

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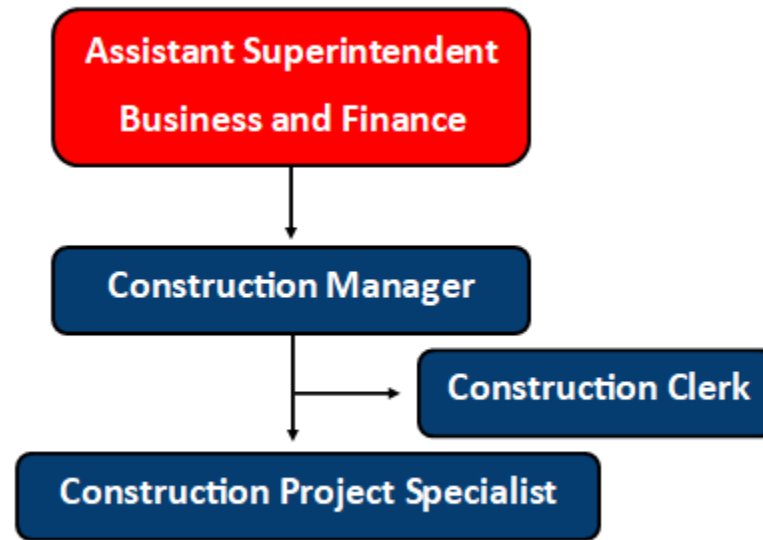
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Exhibit 2.1 – Organizational Chart



Construction Department Organizational Chart

APRIL 2022

Section 3 - Owner-Architect Agreement

3.1 The District utilizes a owner-edited A201, owner-edited A201 general conditions, and owner supplemental general conditions. A copy of these documents and associated Exhibits are available upon request to the Construction Manager. On a typical project, the agreement stipulates that the following consultants are retained at the Architect's expense:

- Structural Engineering
- Civil Engineering (On-site Civil)
- Roofing, Acoustical, Asbestos Survey, and Food Service Consultants
- Landscape Architect
- Traffic Engineer
- Technology
- Theatrical
- Pool
- Mechanical, Electrical, and Plumbing Engineering* (*refer to section 3.5*)

3.2 Reimbursable expenses are typically limited to the following:

- Asbestos Consultant (Sample Testing Only)
- Civil Engineering (Off-site utilities; Turn lanes)
- Fees paid for securing approval of authorities having jurisdiction over the Project
- Reproductions for contract documents only (no progress printing, etc. used by Architect and Consultants). Discussion to occur between CM/Architect for the number of drawings to be printed.
- Proposal advertising costs
- Topographic, boundary surveys – (Project Manager to confirm any existing surveys located in the property file can be used). If the document does not exist, have 3 copies sent to this office. 1 for the project file and 2 for the property file.
- Geotechnical investigation (soil report). PM to confirm if any existing report, located in the property file can be used. (If the document does not exist, have 3 copies sent to this office; 1 for the project file and 2 for the property file).
- Third-party plan review per TEA
- Half-Size Posted Addendum plans and full-size Posted Addendum plans used by the Owner during construction. – Electronic copies shall be provided for the District to archive. Hard copies shall be provided per the Project Manager's request.
- Plan review fees paid for TAS compliance
- Asbestos Testing performed prior to the start of design. (Sample Testing Only)

3.3 The District's standard Exhibit A to the Owner-Architect Agreement includes the following stipulations:

- The plans and specifications are the property of the Owner and are to be furnished in electronic form upon completion of the Project.



- The Architect shall have the right to include photographic or artistic representation of the design of the Project among the Architect's promotional and professional materials only if consent in writing in advance is obtained from the Owner and all materials reviewed in advance. The Architect is required to provide professional credit for the Owner in any promotional materials.

3.4 Once the Master Service Agreement is executed by the District and the Architect, all subsequent projects will require the execution of an Exhibit D to the Master Agreement.

3.5 It is understood and agreed that the District can separately retain an engineering firm to provide the mechanical, electrical and plumbing ("MEP") engineering consultant services for our projects, such engineering services would not be included in the Architect's basic services, and the Architect's Fee would be adjusted and reduced by the lesser of (1) the MEP consultant services fee paid by the District to the MEP engineer for this project, or (2) an amount equal to a negotiated percent of the MEP construction costs (excluding General Contractor's general conditions and overhead & profit).

Section 4 – Construction Delivery Method

4.1 Per the Texas Education Code, school districts are allowed to utilize one of several allowable delivery methods for the construction and renovations of school facilities. G-PISD's preferred construction delivery methods are Competitive Sealed Proposal (CSP) Work Order Contracts (WOC), and Job Order Contracting (JOC). The Construction Department generally utilizes one of these delivery methods for all construction projects to be performed in the district.

4.2 If the District believes that another delivery method would provide the District with the best value for a particular project, the Construction Department must acquire Superintendent approval recommending the alternate delivery method for the specific project. This approval must be submitted well in advance of when the project is scheduled to be released for receipt of proposals. Upon approval by the Superintendent of an alternate delivery method, the Construction Department can then proceed with the preparation of the construction documents to meet the requirements of such an approved delivery method for the project.

4.3 Any alternate delivery method that is proposed for a particular project must be reviewed and approved by the Assistant Superintendent of Business and Finance. The Asst. Supt. shall present the justification for such alternate delivery method to the Superintendent for consideration and approval.

4.5 Any delivery method that G-PISD utilizes must comply with board policy CV(Legal) and CV(Local).

Section 5 – Job Responsibilities

Gregory-Portland ISD assembles a "Design and Construction Team" consisting of the Owner, Architect and/or Engineer, and General Contractor (GC), to design and construct or remodel the campuses within the scope, cost, and schedule parameters established by the District for all Capital Construction Projects. The Architect and/or Engineer and GC are separate entities contracted to the Owner that must work as a team for the duration of the project. Towards this end, this memorandum documents an understanding between the Owner, Architect/Engineer, and General Contractor (GC) regarding the roles and responsibilities of each party, which are consistent with the interests and objectives of the Owner.

Identification of Team Members:

G-PISD Project Management – See the specific district Directory in Chapter 1, Section 2.

Architect/Engineer (A/E) – See the specific projects for individual Architects/Engineers.

General Contractor (GC) – See the specific projects for individual General Contractors.

Roles and Responsibilities of Team Members

A Responsibility Matrix detailing the primary and secondary responsibilities of the team members is included as Exhibit 5.1. Below is a general overview of each team member.

Owner – The responsibilities of the Owner are outlined in the Owner-Architect, and Owner-GC agreements and include:

- Furnishing all information regarding the requirements of the project
- Contract Negotiations
- Final decisions on all matters resulting in costs
- Final approval of all payments
- Final approval of all design submittals
- Final approval of all subcontractor selections
- Final approval of the guaranteed maximum price
- Final approval of all change orders
- Internal District reporting
- Budget Oversight
- Payment reviews and approvals
- Project acceptance and closeout

Construction Manager (CM) – The CM shall assist in those management activities necessary to coordinate the efforts of all parties to the project. The objective of the services provided by the CM is to promote efficient and coordinated design and construction of the project within the parameters established. In accomplishing this objective, the CM will have the role of leadership of the Design and Construction Team for the Project. The CM will facilitate District actions concerning responsibilities as defined in the Owner-Architect and Owner-GC agreements. Throughout this manual, several responsibilities are assigned to the CM, the CM may choose to delegate certain tasks. However, the ultimate responsibility rests with the CM.

The CM will utilize *project management*, *observation*, and *support* to accomplish the responsibilities.

Project Management – The district will assign a CM to the project. The CM will be the point of contact for the Architect/ Engineer and GC. The CM will be responsible for tasks associated with the following:

- Planning and milestone scheduling
- Design assistance
- Payment reviews and approvals up to \$9,999
- Team coordination
- Change control
- District activity coordination
- Review of payment applications

Observation – The CM will assign a Project Specialist (PS) to the project. Project Specialists report to the CM. The PS will be primarily on-site, and will generally be responsible for tasks associated with the following:

- Review and coordination of submittals
- Observations of project for compliance with contract documents
- Coordination of testing and inspections for the Project (Survey, Geotech, MAT, TAB, Commissioning, and Asbestos Monitoring)
- Daily reporting of construction activities
- Review of GC payment applications
- Coordination of District activities/departments with construction

Observations by the CM/PS are intended for the benefit of the District and do not relieve the Architect/Engineer or GC of their inspection requirements included in the Owner-Architect/Engineer and Owner- GC agreements.

Support – The PS will support the CM with the following:

- Review of Architect/ Engineer and GC cost estimates
- Constructibility reviews
- Analysis of educational furniture, fixtures, and equipment
- Furniture layout and planning
- Coordination of furniture, fixtures, and equipment installation
- Move-in coordination

Architect/Engineer (A/E) - The primary function of the A/E is to carry out the professional activities of design, contract administration, and inspection necessary to achieve a project that meets the District's expectations of scope, quality, cost and schedule, as well as complying with all applicable code requirements. In accomplishing this objective, the A/E will have the role of leadership of the Design and Construction Team in matters related to design planning, design evolution, design processes, selection of materials and equipment within constraints established by the Technical Specifications, and overall administration of the contract documents.

The A/E's tasks will generally include:

Design – The A/E will assign a design team to the project whose responsibilities include:

- Refinement of the District's Educational Program as required
- Facilitating and documenting all design meetings
- Local code review and compliance with local code requirements

- Coordination with local utility companies
- Schematic Design
- Schematic Design cost estimate
- Modification to the schematic design as necessary to meet the District's expectations
- Design Development
- Modification to the design development documents as necessary to meet the District's expectations.
- Construction Document packages as required to meet the Design and Construction Team's approved bid package strategy.
- Assisting with the bidding process
- Permitting Construction Documents packages

Contract Administration – The A/E shall assign a representative to the project responsible for contract administration, including:

- Attending weekly or biweekly construction progress meetings
- Assisting with pre-construction conferences
- Review and approval of submittals
- Review of laboratory and field reports
- Review and respond to GC questions
- Preparation of all necessary proposal requests
- Review and provide a recommendation for all GC change proposals
- Review of the GC's cost estimate
- Review and approve the recommendation of all GC applications for payment
- Review and approval of GC closeout documents
- Final approval of GC work
- Transfer of Record Documents to the District, including electronic media

Inspection – The A/E and district consultants shall collaborate to provide inspection of the work to ensure compliance with the contract documents, including:

- Regular site observations and documentation
- Checking of bearing surfaces of building foundations
- Inspection of reinforcing steel prior to concrete placement
- On-site observation of placement of structural concrete
- Inspection of structural steel after erection
- Inspection of mechanical work, including verification of correct operation
- Inspection of electrical work
- Punch list inspection
- Final inspection
- Scheduled warranty inspections

Monthly Project Status Report (PSR) - The Architect, CM and each GPISD Project Specialist shall attend monthly PSR meetings to update the team on the status of projects in design and under construction. The schedule, submittal and CPR log shall be reviewed during these meetings.

General Contractor – The GC shall provide construction expertise and construct the project in accordance with the approved construction documents. In accomplishing this objective, the GC will have the role of leadership of the Design and Construction Team in matters related to construction.

Construction Phase – The GC shall assign a construction team, including a Superintendent, Project Manager, and appropriate support staff to the project whose responsibilities include:

- Pre-construction conferences with all subcontractors
- Project supervision and control
- Project coordination
- Detailed scheduling, including District activities
- Monitoring of schedule compliance
- Evaluation of subcontractor performance and implementation of corrective action as required
- Cost control, including tracking and forecasting
- Change order control
- Permits
- Safety
- Contract interpretations
- Shop drawing and samples review and approval
- Daily progress and issue reporting
- Record documents
- Completion inspections and implementation of corrective action as required
- Systems start-up and checkout
- Project closeout
- Warranty inspections, and implementation of corrective action as required

See **Exhibit 5.1** for the Construction Department responsibility matrix.

Exhibit 5.1

	TASK	Assistant Superintendent Business and Finance	Construction Manager	Construction Project Specialist	Purchasing Coordinator	Architect/ Engineer	General Contractor
I. PROGRAM PLANNING & MANAGEMENT	Establish Master Schedule of All Projects	P	S				
	Maintain Master Schedule		P	S			
	Establish Project Budgets, including non-construction cost items	P	S				
	Establish Budget Tracking Procedures		P		S		
	Write Technical Specification Standards for Projects		P			S	
	Write, Advertise, and Post RFQ		S		P		
	Establish Architect Selection Procedure		S		P		
	Establish GC Selection Process		S		P		
	Write, Advertise, and Post CSP		S		P		
	Establish Program Cash Flows	P	S				
	Establish Program Reporting Procedures		P	S			
	Prepare a Monthly Program Status Report		P	S			
	Prepare Special Program Communications to the Public	S	P				
	Establish Procedure for Selecting Material Testing Firms		S		P		
	Establish Procedure for Selecting Surveying Firms		S		P		
	County/City Meeting		P	S			
	Establish Plan Review and Permitting Requirements with State & Local Code Authorities		P			S	
	Establish Utility Coordination Requirements with Local Utility Companies		P	S			
	Establish District Standard Procedures and Forms for items such as Change Orders, Request for Information, Notice to Proceed, Notice of Award, Final Acceptance, Punchlist, Warranty Inspections, etc.		P	S			
	Update Trustees on Program Status at Meetings and Work Sessions	P	S				
	Update Cabinet on Program Status	P	S				
	Contract Award Notification		S		P		

P = Primary Responsibility

S = Support Responsibility

Exhibit 5.1

	TASK	Assistant Superintendent Business and Finance	Construction Manager	Construction Project Specialist	Purchasing Coordinator	Architect/ Engineer	General Contractor
II. PRE- DESIGN	Negotiate Architect Agreement for District Approval	P	S				
	Negotiate GC Agreement for District Approval	P	S				
	Approve Agreements	P	S				
	Manage the efforts of the Architect to ensure budget and schedule compliance		P	S			
	Review and Recommend Approval of Architect Applications for Payment		P	S			
	Facilitate Design Meetings and Prepare Minutes		S			P	
	Prepare Preliminary Detailed Construction Schedule		S			P	
	Review Preliminary Detailed Construction Schedule		P	S			
	TASK	Assistant Superintendent Business and Finance	Construction Manager	Construction Project Specialist	Purchasing Coordinator	Architect/ Engineer	General Contractor
III. DESIGN PHASE	Prepare Schematic Design Package		S			P	
	Prepare Schematic Design Cost Estimate		S			P	
	Review Schematic Design Cost Estimates	P	S				
	Facilitate Estimate Reconciliation if Necessary		S			P	
	Review Schematic Design for Compliance to Approved Educational Program		P	S			
	Final Review Schematic Design	P	S				
	Prepare Design Development Package		S			P	
	Prepare Design Development Cost Estimate		S			P	
	Review Design Development Cost Estimate		P	S			
	Facilitate Estimate Reconciliation if Necessary		S			P	
	Establish alternative methods or materials if necessary to reduce costs		S			P	
	Review Design Development Documents for compliance with Schematic Design		S			P	
	Review Design Development Documents for Constructability Issues		S			P	
	Final Review Design Development Package	P	S				

P = Primary Responsibility

S = Support Responsibility

Exhibit 5.1

Develop Bid Package Strategy		S		P		
Prepare Schedule for Completion of Design Packages and Construction		S			P	
Prepare Construction Document Packages		S			P	
Prepare Cost Estimate for 50 % CD Package		S			P	
50% CD Review		P	S			
50% CD Internal Consult Review		P	S			
Prep Cost Estimate for 75 % CD Package		S			P	
75% CD Review		P	S			
75% CD Internal Consult Review		P	S			
Prep Constructability of 95% CD Package		S			P	
95% CD Review		P			S	
95% CD Internal Consult Review		P	S			
Review CD Package for Compliance with the Technical Specifications		P	S			
Coordinate CD Package with Utility Companies		S			P	
Submit CD Package for Permit		S			P	
Obtain Permits for CD Package		S			P	
Prepare an analysis of the educational furniture, fixtures, and equipment required		S			P	
Prepare specifications for bids for the educational furniture, fixtures, and equipment		P	S			
Obtain bids and issue purchase orders for educational furniture, fixtures, and equipment		S		P		
Develop a plan to receive and install the educational furniture, fixtures, and equipment.		S		P		
Plan, budget and procure all materials and supplies required, including textbooks, library materials, computers, software, athletic and band uniforms and equipment, kitchen supplies and loose equipment, janitorial supplies, etc.	P			S		

P = Primary Responsibility

S = Support Responsibility

Exhibit 5.1

	TASK	Assistant Superintendent Business and Finance	Construction Manager	Construction Project Specialist	Purchasing Coordinator	Architect/ Engineer	General Contractor
IV. BIDDING PHASE	Advertise for Bids		S		P		
	Affidavit and Advertisement Document filing		S		P		
	Print Documents for Contractors		S		P		
	Issue Documents to Contractors		S		P		
	Conduct Pre-Bid Conferences		S			P	
	Collect Subcontractor Questions				P	S	
	Prepare Addenda				S	P	
	Review and Approve Addenda		S		P		
	Distribute Addenda to Contractors				P	S	
	Receive Contractor Bids		S		P		
	Publicly Open Contractor Bids		S		P		
	Tabulate Contractor Bids and Recommend Award	P			S		
	Review Recommendations	P			S		
	Approve Recommendations	P	S				
	Issue Notice of Award and Notice to Proceed for Each Package		S		P		
	TASK	Assistant Superintendent Business and Finance	Construction Manager	Construction Project Specialist	Purchasing Coordinator	Architect/ Engineer	General Contractor
VI. CONSTRUCTION PHASE	Conduct Pre-Construction Meeting with Architect and GC		P	S			
	Conduct Pre-Construction Meetings with each Subcontractor			S			P
	Manage with Day to Day Construction Activities			S			P
	Prepare and Maintain Total Project Schedule including Owner, Architect and CG activities		P	S			
	Inspect Work Daily for Compliance with Documents			S		P	
	Inspect Work Periodically for Compliance with Documents			P		S	
	Implement and Monitor Safety Plan			S			P

P = Primary Responsibility

S = Support Responsibility

Exhibit 5.1

Schedule soils, concrete, steel, etc. testing					S	P
Observe Testing			P		S	
Review and Approval of Subcontractor Submittals			S		P	
Review of Submittals for Coordination as Required					P	S
Conduct weekly Owner, Architect, Contractor coordination meetings		P	S			
Respond to Contractor Questions			S		P	
Track Contractor Questions and Responses (RFI)			S		P	
Review and Recommend Approval of Contractor applications for payment		S			P	
Review and Recommend Approval of Architect applications for payment		P	S			
Review and Recommend Approval of Testing Agency applications for payment	P	S				
Approval of Payments	P	S				
Daily Reporting of construction activities, manpower, issues, etc.			S			P
Issue Proposal Request as needed			S			P
Review and Recommend Approval of Contractor change pricing		S			P	
Initiate Change Orders for Approval			S		P	
Approve Change Orders	P	S				
Schedule Updates					S	P
Schedule Update Review		P				S
RFI'S SUBMITTALS (IF AFFECTS DESIGN)	S	P				
Coordination of Owner activities with construction activities		S	P			
Construction Cost Tracking		P	S			

P = Primary Responsibility

S = Support Responsibility

Exhibit 5.1

	Total Project Cost Tracking		P	S			
	Review of Testing Results		S			P	
	Progress Reporting to the Owner					S	P
	Maintenance of As-Built Drawings and Specifications		P	S			
	Contractor's Pre-Punchlist					S	P
	Official Punchlist Inspection		S			P	
	TASK	Assistant Superintendent Business and Finance	Construction Manager	Construction Project Specialist	Purchasing Coordinator	Architect/ Engineer	General Contractor
VIII. CLOSE-OUT	Conduct Owner Training			S			P
	Coordination of Owner Move-In		S	P			
	Update CAD drawings with As-Built information					P	S
	As-Built Drawing Review for Completeness. All CPR, RFI, etc Included			P		S	
	Transmittal of Close-Out Documents					S	P
	Review and Approval of Close-Out documents			P		S	
	Certify the Project Complete	P	S				
	Recommend for Final Payment	P				S	
X. WARRANTY	Establish Warranty Procedures		P	S			
	Log Request in "Project Warranty Log"		S	P			
	Coordinate Review of Request			P			S
	Schedule Repair			S			P
	Coordinate Verification of Repair			S		P	
	Confirm w/ all parties (School Maintenance, Architect, Contractor) that Warranty Item is Completed.		S	P			
	Archiving and Boxing		S	P			P

P = Primary Responsibility S = Support Responsibility

Section 6 – Bond Project Initiation

6.1 When a Bond Authorization has been approved by the Taxpayers of G-PISD, The District will prepare options for developing project packages for all of the projects included within the Bond Authorization. The proposed project packaging options will be submitted to the Superintendent for review, comment and approval.

6.2 The Long-Range Planning Committee will review and comment on the proposed packaging options. Any revision will be incorporated into a final document for final approval. Once the approval of the project packaging has been obtained, the Construction Department, under direction of the Assistant Superintendent of Business and Finance, will prepare an estimated budget schedule; submit the budget schedule to the Finance Department for their use in establishing the schedule for Bond Sales needed for the funding of all approved bond projects in the Bond Authorization.

6.3 The following is a link to the Bond Project Dashboard that details the approved bond projects and their progress.

[BOND CONSTRUCTION DASHBOARD](#)

Section 7 – Establish the Project Team

7.1 When a new project of the capital or bond program is set to begin, the Construction Manager will assign a Project Specialist to the project.

7.2 The Construction Manager will work with the Purchasing Coordinator to procure the programs architectural and/or engineering services firm via Request for Qualifications.

7.3 The Assistant Superintendent of Business and Finance will negotiate A/E Fees.

7.4 Once the A/E is approved, Construction Manager shall issue a “Notice to Proceed” to the Architects for the projects to which they have been selected to provide design service. Notice to Proceed includes detailed scope of work, milestone project dates for bidding and construction completion. The Architect will then provide the following for review and approval:

- A/E proposed project personnel and design consultants
- Preliminary Construction Budget
- Comprehensive project schedule

7.5 The Construction Manager will prepare an Exhibit D to the Owner/ A/E Agreement for a negotiated fee based on the G-PISD initial construction budget and send to the Architect along with the Notice to Proceed. See Chapter 2, Section 3 for additional information.

7.6 The Assistant Superintendent of Business and Finance will review the information provided by the Architect and provide comments.

7.7 The Project Specialist shall solicit a proposal for third party code review and generate an Exhibit C to the Master Service Agreement for third party code review and route for signatures. See Chapter 6 for additional information.

7.8 The Assistant Superintendent of Business and Finance shall name the project with the year the project begins design. Purchasing Coordinator shall generate the CSP number for the project and provide the number to the Construction Manager. Construction Manager shall forward the CSP number to the A/E for inclusion in the final issue construction documents. The Purchasing Coordinator will generate the advertisement and submittal information. This same CSP number is to be used on any and all project specific documents.

7.9 On new buildings, the Project Specialist shall contact the City of Portland to obtain a building address for the site.

7.10 The Construction Clerk shall create and retrieve project files for each project in the current phase of construction and archive them on the appropriate Project Management Sheet. ([Smartsheet](#))



Section 8 – Negotiation of Architectural and Engineering Fees (Invoice Processing)

8.1 Once an A/E has been selected for a designated project, the initial A/E fees shall be based on a percentage of the G-PISD preliminary budget plus reimbursable expenses. A/E shall have 45 days to provide a detailed list of expected reimbursable expenses.

- The A/E Fee will be negotiated between the A/E, the Construction Manager, and the Assistant Superintendent of Business and Finance.

8.2 Once established, the contract amount shall be entered into Smartsheet by the Construction Clerk. The Construction Clerk shall then request appropriate funding from the Director of Finance and then generate a requisition for a PO once approval signatures are obtained.

8.3 Purchasing will create a purchase order in Skyward and forward the purchase order to the construction clerk.

8.4 The Construction Clerk shall send the A/E a copy of the purchase order and archive a copy within Smartsheet.

8.5 Upon receipt of proposals, the A/E fee shall be adjusted reflect the negotiated percentage fee of the final bid day construction cost.

8.6 Errors and omissions in the construction documents shall be addressed as outlined in the Agreement between Owner and A/E.

Section 9 – Establish the Project Schedule

9.1 The Construction Manager will prepare a project schedule of key design milestone dates, ending with the final completion of construction for review and approval. The Architects, and/or Engineer, will be required to maintain their design progress according to this schedule.

9.2 Proposals are received at the District's Administration Building at 1200 Broadway Blvd. in Portland, Texas 78374. Projects should be scheduled such that the award of construction contracts occurs during a regularly scheduled board meeting. Typically, proposal results and administration recommendations are presented during the board workshop the Thursday before the Board meeting. The Construction Manager shall verify with the Assistant Superintendent of Business and Finance regarding the need to have representatives of the Contractor present during the workshop and/or the Board meeting.

9.3 Please refer to **Exhibit 9.1** for a sample project schedule which indicates various key milestone dates and tasks.

Exhibit 9.1

Task Name	Duration	Start	Finish
①	①		
Design			
Preliminary Design Phase			
Scope and Program Review			
Schematic Design Phase			
Project Kick-off Meeting			
Design Standards for Project			
Conceptual Design			
SD Production & Cost Estimates			
SD Presentation			
Board Approval - SD Design & OPC			
Execute Schematic Design Phase Letter			
Design Development Phase			
Phase Meeting			
DD Production			
Finishes Meeting			
50% DD Page Turn			
100% DD Docs and Specs Turn-in			
Prepare 100% DD Cost Estimate			
Owner Review w/ Cost Estimate			
Board Approval - DD Design & OPC			
Execute Design Development Phase Letter			
Construction Document Phase			
Phase Meeting			
CD Production			
50% Page Turn			
100% CD Turn-in			
Sign & Seal			
Execute Construction Document Phase Letter			
Jurisdictional Review			
Bidding and Contractor Award Phase			
Issue Bid Documents			
Advertisements			
Pre-Proposal Meeting			
Bids Due			
Bid Evaluation			
Receive Board Packet			
Board Approval - Approve Contractor & Contract			
Construction Phase			
Notice to Proceed			
Permit for Construction			
Pre-Construction Meeting			
Construction Observation			
Substantial Completion			
Post Construction Phase			
Final Punchlist - Warranty Closeout			

Section 10 - Preliminary Project Budget (Create A Budget)

Establish the Preliminary Cost Worksheet

10.1 For projects funded by bond issues, the District has a set overall Bond Authorization amount (Budget) that may not be exceeded. This budget was developed by Architects and Engineers who assisted the District during the bond assessment planning process.

10.2 The Assistant Superintendent for Business and Finance shall provide the Construction Manager with the preliminary budget amount.

10.3 The preliminary budget amount on the project cost worksheet shall be routed for signatures as follows:

- Project Specialist
- Construction Manager
- Assistant Superintendent of Business and Finance

10.4 After the preliminary budget is approved, the budget will be entered into Smartsheet by the Construction Clerk. No changes to the approved preliminary budget shall be made without approval of the Assistant Superintendent of Business and Finance.

10.5 After the preliminary budget amount on the project cost worksheet has been fully approved and executed, in preparation for creating contract approvals and electronic purchase orders, the Business Office will set up budget codes in the Skyward for each specific project.

10.6 The approved preliminary budget must be included when all Exhibits and contracts for a particular project are routed for approval.

10.7 The total final projected cost on the project cost worksheet shall be completed after receipt of proposals and upon selection of a General Contractor.

Section 11 – Third Party Code Review

11.1 School Districts are required to obtain a third-party code review in accordance with the Texas Education Code if the District is not located within a local municipality that provides such plan and code enforcement. This requirement is for all projects regardless whether they are a new project or a renovation. The following is an excerpt from the Texas Education Code:

Excerpt from State of Texas, Texas Education Code

§61.1036. School Facilities Standards for Construction on or after January 1, 2004:

A qualified, independent third party, not employed by the design architect or engineer, shall review the plans and specifications for compliance with the requirements of the adopted building code. The plan review shall examine compliance conditions for emergency egress, fire protection, structural integrity, life safety, plumbing, energy conservation, and mechanical and electrical design. The review shall be conducted prior to the commencement of construction and must be conducted by a certified building code consultant or a third-party architect or engineer. A certified building code consultant is a person who is certified by either the ICC, ICBO, SBCCI, or BOCAI. Associated fees shall be the responsibility of the school district. The reviewer shall prepare a summary list of any conditions not in conformance with the provisions of the adopted building code and is required to send a copy to the school district, design architect, or engineer.

The design architect or engineer shall revise the plans and specifications as necessary and certify code compliance to the district. The reviewer, in his or her reasonable judgment, may allow a limited number of variances from the codes if such variances do not negatively affect the quality or safety of the facility. Any disputes shall be a matter for contract resolution.

11.2 The Construction Manager is responsible for receiving a proposal for third party code review from an approved consultant. The consultant shall be under contract at the same time the Architect is placed under contract.

11.3 The consultant shall provide a written proposal that fully details the project scope and fee.

Section 12 - Topographic and Boundary Verification Surveys

12.1 In the standard G-PISD Owner-Architect Agreement, surveys are the responsibility of the **CEO**, the cost for which is a reimbursable expense. The decision to select a company that provides this service is to be made by the **CEO** which the District has the right to review and approve.

- The **A/E** shall be responsible for making sure all required survey instruments are included in their scope of work. This includes but is not limited to Boundary Verification Surveys, Topographic Surveys, Platting Services and Elevation Certificates.
- All new plats must be approved by the G-PISD Board of Trustees.
- A final copy of the recorded plat shall be provided to G-PISD in two (2) full size set of drawings for the property files and electronic copies in PDF and AutoCAD formats.
- The Construction Manager shall be responsible for filing a copy of the recorded plat in the property file for the project.

12.2 For a NEW school site – The Architect will request a proposal which shall include Boundary Verification Survey, Topographic Survey and Platting Services.

12.3 For Additions and Renovations to an EXISTING school site – The Construction Manager shall request the property files be searched for any existing Topographic Survey, Boundary Survey and Recorded Plat. These documents shall be copied and used where feasible. (Original documents shall not leave the office of the Construction Manager). If the information is not available or required to be updated by the Local City or County Officials, the Construction Manager shall follow the same requirements as a NEW school site as may be required.

12.4 The Construction Manager shall follow up with the A/E to make sure that they have provided the District with (1) electronic copy and (2) paper copies of the requested surveys (1 for the project file and 2 for the property file). The Construction Manager must ensure that the documents have been placed into the correct file locations prior to approving the A/E invoice and forwarding to the Assistant Superintendent of Business and Finance for final approval.

12.5 If the project is in the Flood Plain, a proposal for the issuance of an Elevation Certificate may be required and then circulated for review and comments.



Section 13 – Geotechnical Investigation

13.1 In the standard G-PISD Owner-Architect/Engineer Agreement, the geotechnical investigation for the site is the responsibility of the Architect and the cost is considered a reimbursable expense.

13.2 After the footprint of the new building has generally been established on the site, mark boring locations on a site plan. Boring locations and sizes are determined by the project Architect. When building pads are proposed to be placed over existing drainage swales, make sure at least (one) of the boring locations is located within the swale.

13.3 For renovation projects, the Project Specialist shall coordinate with the G-PISD Maintenance Department to locate all District utilities prior to boring activities.

13.4 Based on the finding of the geotechnical investigation, the project team shall consider including an allowance for unforeseen soil conditions.

Section 14 – Evaluation, Project Kick-off and Schematic Design

14.1 The Owner-Architect Agreement stipulates that the Architect acknowledges that they are the leader of the design team and as such they are responsible for the design of the entire project. The Architect also acknowledges that the Owner is neither an architect nor engineer and the Owner is not knowledgeable in design of the project. The Architect is required to design a facility for the Owner that is consistent with the degree of care and skill ordinarily exercised by other architects currently practicing under similar conditions.

14.2 The Architect's initial project responsibility is to provide a preliminary evaluation of the Owner's site for the Project and the Owner's program, standards, schedule and budget for construction. The Architect is responsible for a preliminary evaluation of the Owner's proposed method of contracting for construction services and the impact that such method may have on the Owner's program, budget and schedule requirements. The Architect is also responsible for assisting and providing updated material for Owner's program and standards as requested by the Construction Manager.

14.3 The Construction Manager shall sign and route to the Architect the Project Compliance Certificate, as required by the State of Texas, to the Owner for approval and execution during each required phase of the project until form is completed.

14.4 The Construction Manager will work closely with the Assistant Superintendent of Business and Finance to determine the phasing of a project. The phasing should be coordinated with the A&E Team, Design Team, and all G-PISD departments that will be affected. Project phasing and coordination should be complete before the project is bid.

Design Guidelines

In general, each project goes through several phases of design including but not limited to:

- Kick Off,
- Programming/Schematic Design (SD),
- Design Development (DD),
- 50% Construction Documentation (CD)
- 75% CD
- 95% CD
- Page Turn
- Quality Assurance Quality Control (QAQC)

Note – Based on timing and project scope, not all of the above meetings may be required.

14.5 Schematic Design (SD) documents shall establish the conceptual design of the Project, illustrating the scale and relationship of the Project components. The SD documents are to include a conceptual site plan, floor plan(s), sections, elevations and perspective sketches at a minimum. Exhibit C of the Owner-Architect Agreement describes specific requirements for these documents. SD documents must also include an updated budget and itemized cost construction cost estimate. Within two business days after all design meetings, the Architect shall provide a copy of the meeting minutes for review by G-PISD.

At the conclusion of Design Development, the following general expectations, in addition to items stipulated in the Owner Architect B102 and Exhibits, shall be met:

COVER SHEET - Project Number, Project Name, Names, addresses and contact information of complete project team, Date, Submittal stage. i.e.: "Schematic Design Phase", etc., Scope of work narrative, program, List of applicable building information, to include at a minimum: Codes applicable to project Occupancy, Construction type, Occupancy separation (if required), Area calculations for each space, each floor, and building total, List of anticipated building code variance requests

SITE DESIGN - Existing conditions including topography, Demolition, New and existing building outline(s), Site entrance, Roads and driveways, Parking locations, Waste collection location, Walkway locations, Stairway locations, Future expansion, Utility requirements, Site utilities, Soil detention location, Accurate North arrow and graphic scale

LANDSCAPING - Existing conditions including material to be protected, Existing irrigation field verified if applicable, new system

BUILDING INTERIOR DESIGN - Floor Plans, Typical floor plans with legends and graphic scales, Demolition Floor Plan(s) with wall legends, Life Safety Floor Plans, Show all required rated fire or smoke walls, Show all required exits and exit widths, New Construction Floor Plan(s) with wall legends, Provide area use identification (name) and area in square feet, Show all mechanical, electrical and other service closets and rooms, Show all circulation paths, Show flexibility for expansion and alterations, Provide preliminary layout of major spaces with fixed equipment, Show Custodial Closets with floor drains, sinks, and storage, Show elevator location(s) Show elevator equipment room location(s)

BUILDING EXTERIOR ENVELOPE DESIGN - Typical elevations, Fenestration layout, Material designations, Overall building cross-sections, Roof Plan layout, Energy code requirements

STRUCTURAL SYSTEM - Indicate structural design scheme, Provide a written description

MECHANICAL SYSTEM - Show all exterior equipment locations, show all interior mechanical equipment room locations, indicate the size of mechanical room(s), show all vertical mechanical chases

PLUMBING AND PIPING SYSTEMS - Show restroom location(s), Show emergency shower and eye wash locations, Show all vertical plumbing and piping chases

FIRE PROTECTION SYSTEM – Indicate routing of utility fire line, vault, riser room location, etc.

ELECTRICAL – POWER DISTRIBUTION - Exterior equipment locations, Electric closet(s) location(s), main power routing, transformer, generator.

ELECTRICAL - LIGHTING - No requirements for standard interior lighting. Main components of site and athletic lighting located.

ELECTRICAL - FIRE ALARM SYSTEM – main components located.

ELECTRICAL - COMMUNICATIONS, DATA, AND TECHNOLOGY (Including Voice, Data, Video, and A/V Systems) Closet locations and size, Size and server room, location of racks.

OTHER GRAPHICS Rendering(s), models, or other graphics as necessary to clearly present concept.

COST ESTIMATE Preliminary construction cost estimate (system-by-system acceptable).

Note - Design Development Phase shall not be considered completed until the Architect submits their preliminary cost estimate.

Designed facility building program vs. District program standards comparison.

14.6 The Architect shall verify and confirm that the design is compliant with the latest version of the Texas State *School Facilities Standards for Construction*. These standards are periodically updated and the updated standards apply to projects for which construction documents are approved by the Board of Trustees or the Board's authorized representative, by an established date stated in the latest version. **Architect shall provide written verification of such analysis and compliance at this phase.**

14.7 Typically 2 to 3 SD level meetings will be required for a new school. More or less may be scheduled as needed.

14.8 The Architect shall be responsible for providing a sign in sheet and ensuring all participants at the meetings sign in. This sign in is attached to the required meeting minutes.

14.9 The following is a list of activities that typically occur during all design meetings. It is the primary responsibility of the Construction Department to ensure these items take place:

- 1) Schedule the meeting:
 - a. Notify all attendees
 - b. Schedule time slots (see sample itineraries)
 - c. Schedule conference room (if applicable)
- 2) Maintain scheduled time slots during the meeting.
- 3) Introduce all attendees.



- 4) Brief each attendee on the basics of the program (repeat design of _____, with the following modifications ..., etc. and/or planned bond scope).
- 5) Show each District attendee the applicable sheets to their area. Walk them through the basics of the design, answer questions. Seek their approval, and also any changes that they request.
- 6) If requested changes are consistent with District Standards, mark up the drawing with the change. If requested changes are not consistent with Standards, follow up with Assistant Superintendent of Business and Finance to determine implementation.
- 7) Have each District attendees sign the attendance roster or cover sheet before leaving, acknowledging their approval.
- 8) Take notes (Construction Clerk) during meeting and give information to Architect. Architect produces one comprehensive set of meeting notes, including subconsultants as well. The Design Team will then review a draft of the meeting minutes from Architect and make any necessary corrections.
- 9) Follow up with Architect during Schematic review to ensure all programming comments are picked up and incorporated into documents, as well as the Building Program.
- 10) Have Architect produce corrections for each area; the Construction Manager shall forward the revised documents and meeting minutes to all attendees for review and approval.
- 11) If numerous changes are made during the programming meetings, the Construction Manager shall schedule / coordinate a second round of discussions, repeat the above steps.
- 12) If the project is a repeat project, review the CPRs and post occupancy files for necessary information to be included into the design.

Exhibit 14.1

CERTIFICATION OF PROJECT COMPLIANCE

FORMAL Distribution to:	District	<input type="checkbox"/>	Architect/Engineer	<input type="checkbox"/>
	Contractor	<input type="checkbox"/>	Texas Education Agency	<input type="checkbox"/>
	Other	<input type="checkbox"/>	Building Department	<input type="checkbox"/>

1. **PROJECT INFORMATION:** **ARCHITECT/ENGINEER:**
(name, address)

CONTRACTOR/CM:

PROJECT NUMBER:

CONTRACT DATE:

DISTRICT: Gregory-Portland Independent School District
1200 Broadway Blvd.
Portland, Texas, 78374

DATE DISTRICT AUTHORIZES PROJECT:

BRIEF DESCRIPTION OF PROJECT: The Project consists of _____.

2. CERTIFICATION OF DESIGN AND CONSTRUCTION

The intent of this document is to assure that the school district has provided to the Architect/Engineer the required information and the Architect/Engineer has reviewed the School Facilities Standards as required by the State of Texas, and used his/her reasonable professional judgment and care in the architectural/engineering design and that the Contractor has constructed the project in a quality manner in general conformance with the design requirements and that the school district certifies to project completion.

3. **The District** certifies that the enrollment projections, educational specifications and objectives of this facility along with the identified building code to be used have been provided to the Architect/Engineer.

DISTRICT: Gregory-Portland I.S.D.

BY:

DATE:

4. **The Architect/Engineer** certifies the above information was received from the school district, and that the building(s) were designed in accordance with the applicable building codes. Further, the facility has been designed to meet or exceed the design criteria relating to space (minimum square footage), educational adequacy, and construction quality as contained in the School Facilities Standards as adopted by the State Board of Education, July 1992, and as provided by the district.

ARCHITECT/ENGINEER:

BY:

DATE:

5. **The District** certifies to completion of the project (as defined by the Architect/Engineer and Contractor).

DISTRICT: Gregory-Portland I.S.D.

BY:

DATE:

INSTRUCTIONS FOR COMPLETION OF “CERTIFICATION OF PROJECT COMPLIANCE” FORM

Section 1. Identify the following:

- name and address of the school facility
- the Architect/Engineer and Contractor
- the school district’s project number (if applicable)
- the date of execution of the construction contract
- name, address, and telephone number of the school district
- the date that the school district authorized the superintendent to hire an Architect/Engineer– scope of the project.

Section 2. This section outlines the intent of the document. No action required.

Section 3. This section is to be executed by the school district upon transmittal of the information (as listed) to the architect/engineer and is to remain in the custody of the school district throughout the entire project.

Section 4. This section is to be executed by the Architect/Engineer upon completion of the plans and specifications and in conjunction with the completion of the plan review for code compliance (ref. 19 TAC §61.104, School Facilities Standards) and returned to the school district’s files.

Section 5. This section is to be executed by the Contractor upon substantial completion of the project and retained in the school district’s files.

Section 6. This section is to be executed by the school district upon acceptance and occupancy of the project.

NOTE: DO NOT SUBMIT THIS DOCUMENT TO THE TEXAS EDUCATION AGENCY. The school district will retain this document in their files indefinitely until review and/or submittal is required by representatives of the Texas Education Agency.

END OF FORM

Exhibit 14.2

TO: Facilities and Maintenance

CC: District Consultants

FROM: Construction Manager

Subject: Design Process Guideline/Memorandum

Introduction:

The purpose of this document is to provide general parameters for project design/construction documents thru proposal receipt. This memo is a 'living breathing' document; subject matter and names/positions noted below may change at any time. Mainly intended as a Facilities internal document, this is being shared with Consultants to identify certain District processes and levels of expectations related to project design. Items noted below are minimums to be provided/addressed, more items may be required based on individual District and project need.

New Phases of Work

- Master contracts re-issue, if needed
- Phase consultant selection
- Assign RFP Project number
- Calculate fees, bond scope, bond construction budget, request Consultant project team, schedule and create preliminary budget
- Obtain Architect signed proposal, request funds, create requisition, and once P.O. generated issue Architect notices-to-proceed (NTP)
- Paraprofessional staff set up utilizing latest filing organization structure: all electronic server files, all hardcopy file folders including location of hardcopy files

Master Schedule

- Establish master schedule for each phase incorporating all current phase projects as early as practical – (two months prior to first project kick-off)
 - Visit with other school districts to coordinate bidding timelines
 - Balance project load with month to month needs – Board and GCs
 - Promote to AGC, GCs upcoming projects and schedules
 - Keep master schedule current and post in generic form on G-PISD website for other Districts and GCs to see. Postings shall include links to consultant Architect's website for detailed project proposal information

Kick Off – With Operations, Facilities, & Construction (Internal)

- First meeting with Directors
- Confirm Educational Specifications & Construction Standards transmittal to consultants, once each Phase
- Detailed review of scope
- Sharing of G-PISD drawing archives with Consultants:
 - Consultants to research and check out/download drawings as needed
 - Project Specialists will need to assist with drawing exchange
- Consultant team to compile/generate list of needs for G-PISD to assist, provide additional clarification on prior to next scheduled meeting

Programming/Schematic Design – Curriculum – quantity of meetings as needed

- Architect shall generate a meeting sign in sheet documenting all attendees, to be included in the minutes of record
- Kick off meeting with Team One, '30,000-foot level' discussions that may include but are not limited to:
 - Superintendent of Schools
 - Deputy Superintendent
 - Assistant Superintendent of Business and Finance
 - Chief Communications Officer
 - Chief Human Resources Officer (as needed)
 - Executive Director of Safety and Student Services
 - Executive Director of Curriculum and Instruction
 - Executive Director of School Leadership
- Additional schematic design review meetings to follow initial SD Kick-Off with Team One to review development of design and programming concepts.
- Implement SD Level review sign offs. SD to be signed off by Curriculum Administration as appropriate to project.
- Consultant to provide meeting minutes to G-PISD within 2 business days of review meeting, with sign in sheet attached and drawing markups attached.
- The Construction Manager (CM) and the Project Specialist (PS) will review and comment on meeting minutes. Comments are then scanned and emailed to Consultant team and G-PISD Team members.
- Program confirmation
- Consultants shall site verify and formulate questions based on existing conditions and voter approved bond scope
- CM and PS to ensure all digital scans of drawing review markups are provided to District and archived.
- PS to coordinate and begin efforts as related to consultant geotechnical survey services, topographical surveys and coordination/document exchange for asbestos containing material manifests for consultant use
- If possible, Consultant project phase probable cost estimate due –if applicable G-PISD to reject in writing

Design Development – Curriculum

- Architect shall generate a meeting sign in sheet documenting all attendees, to be included in the minutes of record
- Midway through DD Consultant shall prepare for a Team One and Cabinet presentation update
- Curriculum meeting #1 here or 50%

Elementary Education/Curriculum, including but not limited to:

Principal
Administration Guidance and Counseling
Health Services
Music, Art, and PE
Special Education
Curriculum
Instructional Technology
Information Resources/Library
Student Services/Emergency Planning
Technology
Include others as may be needed for specific project/facility at hand...

Secondary/Curriculum for Middle and High Schools, including but not limited to:

Principal
Administration Guidance and Counseling
Health Services
Information Resources / Library
Advanced Academics / Curriculum
Fine Arts / Music / Theater
CTE
Culinary
Art
Instructional Technology
Science
Math
Journalism
ESL
English
Social Studies
SPED
Athletics
Student Services
Safety and Security
Transportation
Technology
Maintenance
Facilities

Include others as may be needed for specific project/facility at hand...

- Implement DD Level approvals and sign offs. DD to be signed off by Curriculum Administration as appropriate to project.
- Consultant to provide meeting minutes to G-PISD within 2 business days of review meeting with sign in sheet attached and drawing markups attached.
- The CM and PS shall review and comment on meeting minutes. Comments are then emailed to Consultant team and G-PISD team members.
- TEA compliance check with Chapter 61, District program compliance.
- CM and PS to ensure all digital scans of drawing review markups are provided to District and archived.
- Utility meeting – CM, PS & Consultant to coordinate, design participates
- Technology utility meeting – CM & Consultant coordinate through G-PISD Technology, design participates.
- Traffic Meeting – CM & PS to Coordinate with appropriate municipality.
- PS to coordinate and complete efforts as related to consultant geotechnical survey services, topographical surveys and coordination/document exchange for asbestos containing material manifests for consultant use.
- It is G-PISD's expectation the entire consultant team complete all project related field verification items by the end of the design development phase before CD level reviews are scheduled
- Consultant project phase probable cost estimate due –if applicable G-PISD to reject in writing
- At the conclusion of DD phase once the:
 1. Team One meeting has occurred,
 2. Follow up meetings have taken place (if necessary) and

3. All comments are addressed, then Architect shall prepare a DD package and a presentation to the Board of Trustees will be added to the next applicable Board Meeting agenda.
- Collaborative for High Performance Schools meeting #1, new buildings & “up to standard” renovations.

Review Colors:

- All specifications are required to indicate percentage level completion in the header or footer of each page at each phase.
- Drawing title blocks on each drawing sheet to clearly indicate percentage level completion
- Specifications hardcopy reprint for each CD level completion is expected in one package submission at the ***beginning*** of each review.
- Digital electronic copies of drawings & specifications are required at the ***beginning*** of each review. CM and PS to ensure all electronic files are archived. Hardcopies will be disbursed to applicable departments upon request.
- 50% **Red** comment color
- 75% **Orange** comment color
- 95% **Teal** comment color
- QA/QC **Blue** comment color, in house G-PISD review.
- The Construction Department shall coordinate review meetings.

Construction Documentation

CD review format:

Grounds
Plumbing
Electrical
Fire Alarm/PA
HVAC/ Energy Manager
Commissioning Agent
Technology
Instructional Technology
Security
Food Service
Operations

50% Review Drawings (Red Comments)

- Architect shall generate a meeting sign in sheet documenting all attendees, to be included in the minutes of record.
- Scope coverage verification.
- Probable construction cost estimates due from Consultant, if applicable G-PISD to reject in writing.
- Page turn to confirm Consultants have picked up comments
- Specifications - Facilities review only.
- CM and/or PS attend Consultants in house coordination review at their respective offices
- Architects to share in-house consultant coordination meeting minutes and sign in sheets
- CM & PS to ensure all digital scans of drawing review markups provided to District & archived as well as record sets of review drawings and specifications.
- DD Book due from Consultant, update later as well for namesake selection.
- Finish Boards start, exterior renderings, provide existing finishes/color scheme of building if renovation, provide larger format caper samples 2’x2’ minimum.
- Consultant/Traffic Engineer to provide DRAFT traffic study (if applicable) for G-PISD routing and review.

- If at any point during the percentage level review it appears evident the consultant team completion level is lacking, G-PISD reserves the right to cancel any/all remaining review sections. Consultant Team to regroup, coordinate and bring CDs up to expected level of completion and provide a recovery schedule to make up any lost time maintaining original G-PISD schedule.
- Consultant to provide meeting minutes to G-PISD within 2 business days of 50% review meeting with sign in sheet attached and drawing markups attached.
- CM and PS shall review and comment on meeting minutes. Comments are then scanned and emailed to G-PISD team.

75% Review Drawings (Orange Comments)

- Architect shall generate a meeting sign in sheet documenting all attendees, to be included in the minutes of record.
- Probable construction cost estimates due from Consultant, if applicable G-PISD to reject in writing.
- Page turn to confirm Consultants have picked up comments.
- If no, cancel all scheduled 75% reviews, Consultant must provide recovery schedule.
- Review with applicable department heads per CD level review list.
- Specifications - Facilities spot check...then...Maintenance review.
- BPM & BPC to ensure all digital scans of drawing review markups provided to District & saved to server as well as record sets of review drawings and specifications.
- PM and/or PC attend Consultants in house coordination review at their respective offices.
- Architects to share in-house consultant coordination meeting minutes and sign in sheets.
- Consultant permit submission if not sooner/coordinate meeting with Fire Marshal.
- All comments generated shall be included in the documents prior to release of drawings for bid.
- Depending on project complexity, consultant team shall submit permitting drawings sooner.
- If applicable, hardware meeting #1.
- Finish boards follow up meeting, provide larger format caper samples 2'x2' minimum.
- Finalize traffic study if applicable, submission to County for comment/approval.
- All comments generated shall be included in the documents prior to release of drawings for bid.
- Consultant submission to Third Party Code compliance review and MUD review if applicable.
- All comments generated shall be included in the documents prior to release of drawings for bid.
- PS issue packages to third party consultants for miscellaneous service proposals/ contracts.
- If at any point during the percentage level review it appears evident the consultant team completion level is lacking, G-PISD reserves the right to cancel any/ all remaining review sections. Consultant Team to regroup, coordinate and bring CDs up to expected level of completion and provide a recovery schedule to make up any lost time maintaining original G-PISD schedule.
- Third party code review (if applicable), prepare for Board agenda.
- Third party review comments **must** be addressed by Consultants & added in CD package prior to bid.
- Consultant to provide meeting minutes to G-PISD within 2 business days of 75% review meeting with sign in sheet attached and drawing markups attached.

- CM & PS review and comment on meeting minutes. Comments are then emailed to Consultant team.
- Follow up with Curriculum – mainly confirm casework, outlets, data, display boards.
- Board Presentation/Update if applicable based on project
- Curriculum meeting #2

95% Review Drawings (Teal Comments)

- All itemized components of finishes standards guidelines need to be addressed and completed by conclusion of 95% review and prior to release of drawings for bid.
- Architect shall generate a meeting sign in sheet documenting all attendees, to be included in the minutes of record.
- Probable construction cost estimates due from Consultant, if applicable G-PISD to reject in writing.
- Page turn to confirm Consultants have picked up comments.
- If no, cancel all scheduled 95% reviews, Consultant must provide recovery schedule.
- Review & recap with applicable department heads per CD level review list above.
- CM and/or PS shall attend Consultants in house coordination review at their respective offices.
- Architects to share in-house consultant coordination meeting minutes and sign in sheets.
- Specifications – Maintenance review.
- CM & PS to ensure all digital scans of drawing review markups provided to District and archived as well as record sets of review drawings and specifications
- CM and Coordinator of Purchasing will facilitate advertisements
- Finalize finish boards and renderings
- Finalize all hardware drawings, specifications and schedules
- All comments generated shall be included in the documents prior to release of drawings for bid
- Consultant/CM finalize reviews for all outside parties – including but not limited to: commissioning, third party code, MUD, permitting, roofing, traffic, fire marshal, ACM review, etc.
 - all comments generated are to be included in the contract documents prior to release of drawings/Specs for bid.
- If at any point during the percentage level review it appears evident the consultant team completion level is lacking, G-PISD reserves the right to cancel any/all remaining review sections. Consultant Team to regroup, coordinate and bring CDs up to expected level of completion and provide a recovery schedule to make up any lost time maintaining original G-PISD schedule.
- Consultant to provide meeting minutes to G-PISD within 2 business days of 95% review meeting with the sign in sheet attached and drawing markups attached.
- The CM and PS shall review and comment on meeting minutes. Comments are then emailed to the Consultant team.
- **Final Page turn**
 - Page turn review for consultants to demonstrate to G-PISD all 50, 75 and 95 percentage review comments have been fully addressed and incorporated into the documents. If a comment is not picked up, Consultant must provide feedback and reasons why.

G-PISD in house Quality Assurance/Quality Control (Blue Comments)

- Immediately following final page turn, architect is to print and provide a full-size hardcopy printed drawing set and specifications for G-PISD use.
- PS shall email Facilities and operations team to review plans and specs over a 2-week period minimum depending on time frame and project size. Smaller projects may be able to be complete in 1 week.
- Blue marker drawing comments, post-it notes on each marked page, global comments on note pad, ask questions as needed.
- Each reviewer is to sign in and date drawing set cover page.

- QA/QC conclusion – arrange Consultant meeting for debrief.
- BPM and BPC to ensure all digital scans of drawing review markups are provided to District and saved to server as well as record sets of review drawings and specifications

In general, it is expected that review comments generated by G-PISD as well as **all** other reviewing entities be fully coordinated and incorporated within the drawings and specifications prior to release of contract drawings for bid. If they are not, the A/E team must provide reasons and justification to G-PISD prior to release of drawings. Addenda are not preferred. Should addenda be needed, however, on any given project they are to be issued no later than 10 business days prior to bid receipt to allow contractors time to thoroughly review, familiarize and provide any needed bid adjustments.

Section 15 – Design Development

15.1 Construction Manager shall ensure that the Architect prepares for a preliminary review of the design development phase of the project with the G-PISD project team. The project should have been thoroughly researched, analyzed, and discussed such that no significant design decisions remain to be made either by Architect or G-PISD.

15.2 The following items are to be prepared, discussed and finalized at the end of Design Development Review meetings to include refinement of, but not limited to, the following:

1. Site plan(s) shall indicate location and size of building, streets, detention area (if required), drives, parking (showing size and number), bus drives, auto drop-off, service areas, bicycle paths and racks and other detail to indicate all features of the site that will be included in the construction program with general dimensioning.
 - a. Provide outfall location of detention, confirm access has been provided.
 - b. Left turn lanes (if required).
2. The Construction Manager shall ensure that the Architect obtains information for a traffic impact analysis and that the traffic impact analysis as approved by G-PISD and is forwarded to the appropriate jurisdiction for review and approval. Any and all comments from the jurisdiction shall be reviewed by the G-PISD prior to direction to proceed with incorporation of the comments into the project documents.
3. Floor plan(s) shall indicate wall thickness, room sizes, ceiling heights, and overall dimensions.
 - a. Doors shall be numbered, and scheduled, materials shall be noted. Door swings shall be indicated on plan.
 - b. Casework, cabinets, marker and tack boards, sinks, and other features and finishing shall be indicated with cut sheets or reference material indicating the detail of the unit proposed.
 - c. Specific room layouts including kitchens, cafeteria, library, administrative, science, gym, storage, or other significant detail items shall be shown on separate sheets as may be required.
4. Exterior elevations shall indicate overall heights, materials, and door & window locations. If sight lines are necessary for the effectiveness of a feature, include a graphic study verifying that the design as proposed allows the feature to perform.
5. Roof plans shall indicate slopes, drainage, walkways, and roofing, system to be employed. Indicate any skylights and mechanical equipment to be incorporated.

6. Prepare cross and transverse building sections through pertinent areas of the building.
7. Include large-scale (1/4") plans of restrooms, kitchens, mechanical rooms, electrical rooms and other areas where a large-scale plan is anticipated to be included in construction drawings.
8. A building code search shall be conducted and conclusions with regard to compliance with all codes and ordinance having jurisdiction over the project shall be listed.
9. Indicate HVAC design data, pipe routing, and single-line plan of duct layouts, equipment rooms showing locations and scale sizes of equipment, exterior service yard, showing equipment location and access. Also, indicate provisions for future additions. MEP Consultants should perform Energy Modeling to illustrate compliance with TX-CHPS.
10. Plumbing plan shall indicate routing of major water and sewer lines and provisions for future additions if required or requested by Owner.
11. Electrical plan shall show the following:
 - a. Location and service entrance on floor plan.
 - b. Site accent and flood lighting, locations.
 - c. Reflected ceiling plan, to indicate lighting fixtures, safety lighting fixtures, security device locations, ceiling speakers, hand set locations, HVAC supply and return registers, exhaust fans, fire exit signs, and other systems of electrical category.
 - d. Electrical Power Plan, showing proposed locations of all devices, including switches, electrical receptacle, clock receptacles, data cable and jacks, telephone cable and handset locations, and call buttons.
 - e. Level of illumination of each area provided by the tentative lighting plan.
 - f. Provisions for electrical power capacity for future additions.
12. Plans shall include required future utilities.
13. The Architect shall provide an updated itemized estimate of the project cost shall be presented for review by the Construction Manager and the Assistant Superintendent of Business and Finance.

Cabinet meeting is to take place before Design Development presentation to the Board of Trustees (when needed)

14. The final Educational Specifications/Building Program Requirements shall be completed and submitted as part of the documents for this Design Development Review. Every space contained in the building shall be programmed in detail in a format approved by the CM; The G-PISD Design Team shall confirm compliance with the district's educational specifications and design standards. Upon approval of the plan, the CM shall ensure that the Architect assembles the information into booklet form for distribution to the administration and Board of Trustees as may be required. The CM shall confirm with

the Assistant Superintendent of Business and Finance as to how many DD presentation books will be required for presentation to the G-PISD Administration and/or Board of Trustees.

15.3 Any revisions as a result of this Design Development review shall be incorporated into the final presentation material for the Design Development Phase presentation to the Administration for final review and approval. A report or presentation to the Board of Trustees may be required to inform the board members of the most current development of the project.

15.4 The design development presentation report to the Board of Trustees (when required) shall be a summary of the Design Development Phase Reviews. The presentation shall be articulate and complete enough to adequately explain the major features of the project. An itemized estimate of project cost shall be included in the presentation. The Design Development Phase Presentation or report to the Board of Trustees shall be prepared in appropriate medium considered by the Architect and the Owner to most effectively inform the Board Members of the progress to date.

15.5 Within seven (7) days after the meeting or report, the G-PISD Design Team will assess the Board comments to the presentation and may elect to refine certain features in the project before construction documents shall begin. Once this exercise is completed, the Architect shall proceed with the construction document phase of the project. The Architect shall furnish a minimum of two (2) original color DD Books along with a drive that provides the presentation in an electronic pdf file format.

15.6 Within seven (7) days after the Board presentation report, the Architect shall forward his notes and minutes taken at the Design Development Phase Review and Board meeting to the office of the G-PISD Design Team.

Finish Materials Color Selections

15.7 For new facilities and for major renovations, the Architect will present finish materials color selections to the G-PISD Design Team for review. The CM shall schedule the Architect to present a preliminary review of their proposed color selections to the District. This review shall be completed prior to any District Committee review dates can be scheduled. Attendees for the review shall be the Construction Department, the Director of Maintenance, Executive Director of Safety Student Services and the Assistant Superintendent of Business and Finance (optional).

15.8 The Architect must produce a color board using the submitted color samples of manufacturers' products to be used in the construction.

15.9 During the presentation of the color selections to the Committee, the Architect must be prepared to suggest alternative color selections.

15.10 The goal of the color selection review with the Committee is to end the meeting with a consensus on the color selections. Within 2 days the CM shall obtain meeting minutes of the review meeting from the Architect for review, approval and filing.

15.11 The Architect will then produce four (4) color boards of the selections approved by the Committee. One (1) color board will be retained by the Architect, two (2) color boards are to be delivered to G-PISD and one (1) color board is to be transmitted to the General Contractor to be kept at the job site. In addition, the Construction Manager shall ensure that the Architect provides a digital photo and an electronic file version of the color boards for the project files.

The Architect shall incorporate all finishes within Construction Documents prior to 95% CD level review.

Exterior Rendering

15.12 The Architect shall produce as part of his basic design services a full color scaled rendering of the building. This rendering shall be provided to the District during the design development phase of the project.

15.13 A second rendering of the building shall be created at the time of substantial completion of the project.

15.14 Renderings shall be presented to the Principal of the campus for display.

Standards

1. The State of Texas has adopted School Facilities Standards that must be followed by all school districts which were developed originally under the Texas Education Code. These Standards can be found in the Texas Administrative Code under Chapter 61, School Districts, Subchapter CC, Commissioners Rules Concerning School Facilities. These latest Standards were updated September 2018.

This information can be found here:

<http://ritter.tea.state.tx.us/rules/tac/chapter061/ch61cc.html>

2. It is the responsibility of the project Architect to ensure the requirements of the State Standards are met in G-PISD projects. It is best practice for the entire G-PISD Construction team to be familiar with this document and its requirements.



Section 16 – Construction Documents Plan Reviews

Campus or Project Name **95% Construction Document Review**

Thursday, May 3, 2018

8:30a – 11:00a	MEP Page Turn	District MEP Department
11:00a – 12:00p	Low Voltage	Technology
Lunch Break		
1:00p – 2:30p	MEP Review	Director of Maintenance
2:30p – 3:30p	Security	Executive Director of Safety
3:30p – 4:30p	Technology	District Technology Team

Construction Procedure Manual



Friday, May 4, 2018

8:00a – 9:00a	50%/75% Arch Page Turn	
9:00a – 10:00a	Grounds/Civil	Director of Maintenance
10:00a – 11:00a	Facilities	Custodial Coordinator
Lunch Break		
1:15p – 2:15p	Food Service	Food Service Director
2:15p – 3:15p	Architectural	Construction Department and Consultants
3:15p – 4:15p	Finishes/Color Selections	Campus POC

Section 17 – Plan Submission for TAS Compliance Review

17.1 All G-PISD building and facility projects with a renovation cost of \$50,000 or more that are not defined as a ‘maintenance project’ (replacements such as roofing, domestic water piping, carpet, etcetera) are required by Texas Government Code, Chapter 469 to be reviewed for and comply with Elimination of Architectural Barriers/the Texas Architectural Barriers Act and Chapter 68 of the Texas Administrative Code. The Texas Department of Licensing and Regulation is the authoritative entity that enforces these rules through the Texas Accessibility Standards (TAS). The most current 2012 TAS became effective March 15, 2012.

State law dictates specific time frames the Architect must comply with for project submissions. To quote Section 68.50 Submission of Construction Documents of the Code:

“...(a) All plans and specifications for the construction of or alteration to a building or facility subject to §469.101 of the Act must be submitted to a registered accessibility specialist or contract provider for review if the estimated construction cost is at least \$50,000. All plans may be submitted in electronic format.

(b) An architect, registered interior designer, landscape architect, or engineer with overall responsibility for the design of a building or facility subject to §469.101 of the Act, shall mail, ship, provide electronically, or hand-deliver the construction documents along with a Proof of Submission form to a registered accessibility specialist, or a contract provider not later than the twentieth day after the plans and specifications are issued. In computing time under this subsection, a Saturday, Sunday or legal holiday is not included.

(c) In instances when there is not a design professional with overall responsibility, the owner of a building or facility subject to §469.101 of the Act, shall mail, ship, provide electronically, or hand-deliver construction documents to a registered accessibility specialist, or a contract provider prior to filing an application for building permit or commencement of construction.

(d) An Architectural Barriers Project Registration form or Architectural Barriers Project Registration Confirmation Page must be submitted for each subject building or facility and submitted along with the project filing fee when the design professional or owner registers the construction project...”

17.2 The Architect or Engineer is responsible for obtaining a proposal from a qualified reviewer for the TAS Plan Review, forwarding the proposal to the district’s Construction Manager for review and approval, and transmitting the plans and specifications to the reviewer. The Architect must follow up to ensure all comments from the reviewer are properly addressed. The CM shall ensure the Proposal / Agreement has been written to be between the Architect and the Qualified Reviewer and a copy is obtained. The CM shall attach a copy of the fully executed proposal to the requisition of a Purchase Order and payment of submitted invoices when the work has been completed. The CM shall confirm a reimbursable P.O. has been fully executed and the preliminary budget and contract worksheet has been updated accordingly.

Section 18 – Jurisdictional Plan Submissions

Health Department and Municipal Utility District

18.1 The Food Service Consultant and/or Architect shall coordinate with and submit all necessary drawings and specifications for the construction, remodeling or conversion of a Food Establishment to the local authorities having jurisdiction.

The Consultants shall obtain all review comments and provide drawing/specification revisions as may be necessary to obtain each Department's approval. All comments shall be addressed and incorporated within the drawings and specifications prior to release of drawings for proposals. The plans and specifications shall indicate the proposed architectural layout, arrangements, mechanical/electrical/plumbing/fire/etcetera systems plans and construction materials of work areas, and the type and mode of proposed fixed equipment and facilities.

18.2 Final review of the food service area is required prior to occupancy of the area.

Fire Marshal

18.3 Builders are required to adhere to all current fire codes and obtain a fire and/or building permit. Local Fire Marshal has authority to inspect completed structures for fire hazards prior to the occupancy of the building. These requirements are changing constantly. Each phase of a project requires a permit by the Fire Marshal.

18.4 Chapter 352 of the Texas Local Government Code authorizes the Fire Marshal, in the interest of safety and fire prevention, to inspect certain structures for fire hazards.

18.5 If the Fire Marshal determines the presence of a fire hazard, the Fire Marshal may order the owner or occupant of the premises to correct the hazardous situation.

18.6 The Architect/Engineer shall prepare all necessary plan sheets required for code analysis compliance and fire code review. The A/E then submits drawings and specifications to including but not necessarily limited Fire Marshal for fire code review and approval. The A/E will provide revisions until the permit is obtained. The Special Warranty Deed for the subject property may also be required as part of the submission. A fire exit plan is required, especially for phased projects.

Storm Water Quality

18.7 Storm Water Quality permits are required for all new development and significant redevelopment. Starting construction without first securing a SWQ Permit is prohibited by state law.

18.8 All plan review comments from the all governmental entities shall be incorporated in the document set preferably before drawings and specifications are released for proposals.

18.9 Definition of New Development

“New development” means development of an undeveloped parcel of land five (5) acres or larger without regard to the amount of land that will actually be disturbed, except for development on an existing undeveloped and undivided parcel of five acres or more of one single-family dwelling unit and one or more accessory structures.

18.10 Definition of Significant Redevelopment

“Significant redevelopment” means changes of one acre or more to the existing impervious surface on a five-acre or larger developed parcel.

Storm Water Quality Management Plan Submittal

18.11 The Architect shall verify that the Civil Engineer has submitted plans for review and approval. Before the County Engineer will approve a SWQ Permit, a Storm Water Pollution Prevention Plan (SWPPP) and/or a Storm Water Quality Management Plan (SWQMP) must be approved by the Local Storm Water Quality Engineer. All submissions must comply with the policies and procedures set forth in the Storm Water Quality Management Regulations of the local jurisdiction.

Application for a Storm Water Quality Permit (by the Contractor)

18.12 The application for a Storm Water Quality Permit must be submitted by the Contractor on a form prescribed and approved by the local jurisdiction.

18.13 The Engineer may require the submission of additional information, drawings, specifications or documents to determine whether a SWQ Permit shall be issued from the information submitted.

18.14 Development activity under the SWQ Permit must start within 180 days from the date of issuance. Failure to initiate development activity shall result in the SWQ Permit becoming invalid.

18.15 The Construction Manager must confirm and follow up as necessary that the Contractor has submitted all the required documents and has obtained the Storm Water Quality (SWQ) permit for the project. The Contractor is required to post a copy of the permit on site and the Project Manager shall obtain a copy for the project file.

Section 19 – Building Electrical and Gas Service Electrical Service

19.1 The district's Construction Manager shall obtain an address from the appropriate jurisdiction early in the design phase of the project.

19.2 The district's CM shall provide a copy of the warranty deed to the jurisdiction in order for an address to be established for new facilities.

19.3 The CM shall begin the process of applying for permanent power on a project as soon as the electrical engineer has completed the electrical one-line diagram and the load analysis.

19.4 The Project Manager shall contact the AEP and determine which AEP office will be running the installation of the electrical service.

19.5 AEP will provide a list of required information needed for electrical service. These items include but are not limited to:

- AutoCAD copy of the site in one of the formats shown below showing the building outline, parking lots, fire lanes, property lines, and your preferred transformer location.
 - 1. AutoCAD 2011 or later versions:
 - Indicate scale on drawings
 - Bind and/or insert reference drawings (Xrefs)
 - Save drawing as AutoCAD 2010 in 2D format
- AutoCAD or pdf of the site plan showing all existing easements.
- A NEC load analysis.
- Building size (square feet).
- An approximate service date to service initiation.
- Electrical one-line, and/or a riser diagram, showing the size and quantity of secondary cables you plan to pull into the transformer.
- Permit address. Each meter will need its own separate address.

- A copy of the recorded warranty deed.
- A copy of the recorded plat.
- Make and model number of the emergency generator transfer switch.

19.6 AEP will issue a Terms and Conditions package for approval and signature by the Assistant Superintendent of Business and Finance as well as a blanket easement agreement. This blanket easement will have to be approved by G-PISD Board of Trustees. For the Board agenda item, the Construction Manager shall provide a site plan to clarify AEP's easement sketches. Typically, two original copies are needed.

19.7 Cost associated with the permanent power shall be paid for according to the construction contract.

19.8 When the blanket easement is sent to the Board for approval, the Construction Department shall also ask for permission for the Superintendent Designee to execute the final easement documents upon the completion of the project.

19.9 Prior to the setting of the electrical meter on a building, the Project Specialist needs to coordinate with Maintenance to obtain an ESI ID# for the new facility.

Gas Service

19.10 The process for gas service is similar to the process for electrical service. However, there is no easement needed for gas service.

19.11 The Project Manager shall contact CenterPoint Energy and determine which office will be running the installation of the gas service.

19.12 CenterPoint will provide a list of required information needed for gas service. These items include but are not limited to:

- Site plan showing the desired meter location
- Complete gas load and list of gas equipment in the building

19.13 Cost associated with the gas service shall be paid according to the construction contract.

Section 20 – MUD Tap Fees and Easements

Tap Fees

20.1 The A/E shall ensure the project civil engineer coordinates with the MUD having jurisdiction for the project for plan review and approval.

20.2 After the MUD approves the civil drawings, the MUD shall calculate the tap fees for new water and sewer service for the project. The Construction Manager shall ensure the tap fee calculation is in line with the rate order agreement between G-PISD and the MUD. The civil engineer can assist with this process.

20.3 The tap fee shall be paid according to the construction contract.

Easements

20.4 The MUD will generate easement documents for the water meter and sanitary sewer. These documents have to be approved by the G-PISD Board of Trustees.

20.5 The Construction Manager shall include the approval of the easements in the earliest possible Board meeting after receiving the documents from the MUD.

20.6 The Construction Manager shall include a site plan with the documents showing the location of the proposed easement.

20.7 The Construction Manager shall make sure the following restoration language is included in the easement agreement:

“The Grantee, from time to time, shall have the right of ingress and egress over, along, and across the Easement Tract for purposes of operating, repairing, maintaining, altering, reconstructing, and/or inspecting (within the Easement Tract) the Facilities and all associated equipment and appurtenances thereto. Grantee’s rights shall include, without limitation, the right to clear and remove signage, sidewalks, irrigation piping and heads, trees, shrubbery, grass, soil and other growth from the Easement Track, and the right to bring and operate such equipment thereon as may be necessary or appropriate to effectuate the purposes for which the Easement is granted; provided, however, any signage, sidewalks, irrigation piping and heads, trees, shrubbery, grass, soil and/or other growth removed by the Grantee upon or across the Easement shall be restored to at least the condition it was in prior to Grantee’s activities.”



Section 21 – Contractor References

21.1 Prior to the receipt of proposals, the Architect is responsible for contacting contractor references and compiling the responses for use by the proposal evaluation team. Questions for references shall reflect the actual evaluation criteria published in the construction documents.

21.2 The Architect shall compile the reference responses in preparation for the proposal evaluation committee once the district has received the submitted proposals for the project.

21.3 These references scores will be included in the overall scoring for contractor references. The Architect and their consultants will also provide their reference evaluation score and the district will also score each contractor accordingly. These three separate scores are averaged together to determine the actual evaluation score for the contractor references.

21.4 If either the Architect or the District has not had any experience working with a submitted contractor, they will not score the contractor and only the submitted contractor references will be utilized for the scoring of the submitted proposal.

Section 22 – Proposal Advertisements

22.1 State law requires the District to advertise for proposals once per week for two weeks (10 calendar days) prior to receipt of bids or proposals deadline and advertise in the county where District's central administrative office is located in a local paper. G-PISD places its ads in the News of San Patricio.

22.2 The Architect shall prepare an advertisement for review and approval by the district's Construction Manager. Ads are traditionally published on Thursday. The typical deadline for submittal for publication is the preceding Thursday at 3 pm. Projects will be advertised for 6 weeks unless otherwise approved by the Assistant Superintendent of Business and Finance.

22.3 The following is a sample advertisement:

REQUEST FOR COMPETITIVE SEALED PROPOSALS

SAMPLE ELEMENTARY SCHOOL, GREGORY-PORTLAND INDEPENDENT SCHOOL DISTRICT

The Gregory-Portland Independent School District will accept Base Competitive Sealed Proposals until 2:00 P.M. and Alternate Competitive Sealed Proposals until 3:00 P.M. on Thursday, February 17th, 2022, at the Gregory-Portland Independent School District Administration Building at 1200 Broadway Blvd., Portland, Texas 78374. A Pre-Proposal Conference will be held Thursday, January 13th, 2022 at 10:00 A.M. at the G-PISD Student Services Center located at 1100 Lang Rd., Portland. Proposal Evaluation Criteria are published in the "Instructions to Offerors" section of the proposal documents. Plans and specifications will be released on Thursday, January 6th, 2022, sets are available to general contractors from the District or Architect website.

The Owner reserves the right to waive any informality and to reject any or all proposals.

22.4 The Construction Clerk shall obtain a digital copy of the advertisement as a backup which shall be placed into the project files.

Section 23 - Pre-Proposal Conference & Proposal Opening

23.1 A Pre-Proposal Conference shall be held for all projects. In order to confirm an available date and time for the conference, as well as dates and times for the receipt of proposals, the Construction Manager shall coordinate the scheduling of the conference room with the Construction Clerk.

23.2 Pre-Proposal Conferences are held at the G-PISD Student Services Center at 1100 Lang Rd., Portland, Tx. Pre-Proposal Conferences should be scheduled within seven (7) days after the release of bid documents.

23.3 The Architect is required to prepare an agenda and maintain a sign-in sheet for all attendees. After the Pre-Proposal Conference, the Architect shall create an addendum which will include the following: the agenda, the sign-in sheet, and any questions or clarifications discussed during the conference. The Architect shall ensure all addenda are sent to all interested Contractors/ Consultants and to each location in which the construction documents were released for pick up and/or review.

23.4 At the end of the conference, a site visit will be scheduled to walk the project site. The Construction Manager and/or Project Specialist for the District and the Architect shall attend all site visits for interested proposers. Any questions or discussions shall be documented via the issuance of an addendum to all parties.

23.5 See **Exhibit 4.3.1** for a sample agenda to be used by the Architect and should be modified as necessary to address any specific project details.

Proposal Opening

23.6 Receipt of sealed proposals is typically held at the G-PISD Administration Building Thursday afternoons.

23.7 Generally, the sealed base proposals are submitted at 2:00 PM, and are held unopened until sealed alternate proposals, project team member names (Contractor's Project Manager and Superintendent), and major subcontractors (major subs masonry, roofing, mechanical, electrical, plumbing and fire sprinkler) are submitted at 3:00 PM.

23.8 Offerors are required to have their sealed envelopes time-stamped when submitted. The Purchasing Coordinator is responsible for monitoring the bid clock and must obtain a stamp indicating the time has passed and officially announcing the close of the receipt of proposals.

23.9 After receipt of proposals is closed, the proposal envelopes are publicly opened and the base and alternate proposal numbers are read aloud by either the Construction Manager, the Construction Project Specialist, or the Purchasing Coordinator. Any proposal that is received after the designated time will NOT be opened and read aloud. The original copy (if marked on the exterior) will be kept for one year. The sender may choose to physically pick up the unopened proposal.



23.10 Typically, the District will read aloud base bid prices and any alternate prices provided by the submitter. The Purchasing Coordinator shall verify that all documents are included in the submission, (Proposal Bond, Qualifications, etc.) as stipulated in the Contract Documents prior to the proposal being considered.

23.11 The Architect is expected to bring a proposal tabulation form, for use by all present during the proposal opening. The tabulation form should list all general contractor plan holders and include blank spaces to write in the portions of the proposals that are read aloud: the base proposal, acknowledgment of addenda, proposal security, and all alternate proposals. The Purchasing Coordinator should review a draft of the tabulation form prior to the scheduled opening and submit any revisions back to the Architect.

(PROJECT NAME)
(SCHOOL DISTRICT)
PRE-PROPOSAL CONFERENCE

AGENDA

(Day, Date & Time)

I. Introduction of Personnel

- A. OWNER: (School District) POC Phone: Email:
- 01 Owner's Representative..... (Title)
02 Owner's Representative..... (Title)
03 Owner's Representative..... (Title)
- B. ARCHITECT: (Company) POC Phone: Email:
- 01 Client Executive (Title)
02 Project Manager (Title)
03 Field Representative (Title)
- C. CONTRACTOR: (Company) POC Phone: Email:
- 01 Project Manager (Title)
02 Project Superintendent (Title)
- D. MEP: (Company) POC Phone: Email:
- 01 Representative (Title)
- E. Civil: (Company) POC Phone: Email:
- 01 Representative (Title)
- F. Structural: (Company)..... POC Phone: Email:
- 01 Representative (Title)

II.

Proposal Date:

Proposal Time:

Proposal Location:

Base Proposal at _____; Alternate Proposal at _____
(Location)
(Address)
(City, State Zip Code)
(Phone Number)

- III. **Changes:** Any changes arising out of questions requiring interpretation, clarification, or correction to the Proposal Documents will be made by Addendum.

Instructions to Offerors (Document AB)

- A. AIA 305 Submittal and References to *Architects* by **(Day, Date & Time)**.
- B. Substitutions of Materials and Equipment – at least ten (10) days prior to the date for receipt of proposals.
- C. Proposal and Bond Forms to be submitted in duplicate.
- D. Determination of Successful Respondent and Award of Contract; Paragraph 19 of Document AB.
- E. Request for Clarification during Proposal Process – at least ten (10) days prior to the date for receipt of proposals.
- F. Post Proposal Information
 - 1. Each offeror shall submit by **(Time) on (Day & Date)** items described within Document AB – Instructions to Offerors, Paragraph 16 – Submission of Post Proposal Information.

IV. **Proposal Forms (Forms AC, AD, AE, AF, AG, AH)**

- AC Competitive Sealed Proposal Form / Alternate Proposal Form
- AD Proposal Bond
- AE Felony Conviction Notification
- AF List of Subcontractors
- AG Proposal Evaluation Waiver
- AH Affidavit of Non-Discriminatory Employment

V. **Summary of Work (Section 01 10 00)**

- A. (Copy and paste the Summary of Work language here from Specs section 01 10 00 – Summary of Work – Part 1 Description of Work)

VI. **Allowances (Section 01 21 00)**

- A. Owner's Contingency Allowance \$0.00
- B. (Allowance)\$0.00
- C. (Allowance)\$0.00

VII. **Alternates (Section 01 23 00)**

- A. Alternate Number 1: (Description)
- B. Alternate Number 2: (Description)
- C. Alternate Number 3: (Description)

VIII. **Miscellaneous Job Conditions**

- A. Utilities
- B. Field Office
- C. Sanitary Facilities
- D. Storage Facilities
- E. Signs
- F. Barriers
- G. Cleaning
- H. Temporary First Aid
- I. Temporary Fire Protection
- J. Construction Aids (scaffolds, staging, ladders, etc.)

- K. Security
- L. Construction Fence

IX. Additional Items

- A. Special Owner Requirements – Section 01 35 23
- B. Document AO – Close-out Checklist
- C. Substantial Completion Checklist – AIA A201-2007, Article 9.8.1
- D. Asbestos
- E. Phasing
- F. Furniture Relocation & Moving

X. Construction Schedule

- A. (Copy and paste the construction schedule language here from Specs section 01 10 00 – Summary of Work – Part 3 Execution – Construction Schedule)

XI. Questions

EXHIBIT 23.2

PROPOSAL TABULATION SHEET

Proposal Date/Time: Thursday, January 28, 2022 at 2:00 P.M. Base Proposals / Alternate Proposals at 3:00 P.M.

Replacement Elementary School Gregory-Portland Independent School District

		Recommended Proposer	
	DIVISION ONE CONSTRUCTION	A+ CONSTRUCTION	
PROPOSAL BOND – 10%	YES	YES	
BASE PROPOSAL	\$26,297,000.00	\$25,930,000.00	
ADDENDA ACKNOWLEDGED	YES	YES	
ALTERNATES			
Alternate Number 1a: Building Controls by Automated Logic	\$478,000.00	\$470,000.00	
Alternate Number 1b: Building Controls by Unify	\$500,000.00	\$487,000.00	
Alternate Number 2: Construction of Deaf Education Suite	\$350,000.00	\$325,000.00	
Alternate Number 3: Cool Roof Design	\$68,000.00	\$70,000.00	
Alternate Number 4: Practice Football Field	\$365,000.00	\$440,000.00	
Alternate Number 5a: Lighting Controls by Automated Logic	No Bid	\$447,000.00	
Alternate Number 5b: Lighting Controls by Wattstopper	\$346,000.00	\$450,000.00	
Alternate Number 5c: Lighting Controls by Unify	\$492,000.00	\$525,000.00	
Alternate Number 6: Category 6A wiring	\$23,000.00	\$35,000.00	
Alternate Number 7: Alternate Light Fixture Schedule	-\$86,000.00	-\$70,000.00	
Alternate Number 8a: Outside Air Split System by Aeon	\$47,000.00	\$45,000.00	
Alternate Number 8b: Outside Air Split System by Daikin	\$38,000.00	\$36,000.00	
Alternate Number 9a: Chillers by Carrier	\$200,000.00	\$295,000.00	

Construction Procedure Manual



Alternate Number 9b: Chillers by Trane	\$205,000.00	\$288,000.00	
Alternate Number 10: Guaranteed Completion Date	No Bid	\$250,000.00	
TOTAL BASE PROPOSAL + ALTERNATE NO. 1a, 2, 5b, 6, 8b, 9b	\$27,737,000.00	\$27,534,000.00	
Post Proposal Addendum #6		-\$790,000.00	
Base Proposal + Alternates Selected + Post Proposal Addendum #6		\$26,744,000.00	
PROPOSER RANK	2	1	

Section 24 – Proposal Evaluation Process

24.1 The proposal evaluation team generally includes the entire G-PISD Construction Department: Department Directors, the Architect's Project Manager and/or Field Representative and the MEP consultant's Project Manager and/or Field Representative. It is the responsibility of the Construction Manager to schedule the evaluation committee to perform the proposal evaluation timely after the receipt of proposals. It is imperative this committee evaluation is scheduled and coordinated in advance of when Board agenda items are due into the Superintendent's office for the upcoming Board Meeting.

24.2 The Architect is expected to have obtained at least three reference responses on each of the offerors to be evaluate, and to have prepared the format for documenting the proposal evaluation process. In order for the reference information to be considered, the reference must score each of the criteria. If a reference chooses to not score a category or can't score (for example, if the reference does not have direct experience with the offeror during a warranty phase of the project), the reference's scores are recorded. However, the scores are generally not included in the proposal evaluation scoring. The architect should make every effort to obtain three complete sets of scores from references for each offeror. The Construction Manager must verify that the reference checks have been completed prior to the scheduled proposal opening.

24.3 The price criteria are scored using the following formula:

- Pricing Score = (Highest Proposal – Proposal Being Scored) / (Highest Proposal– Lowest Proposal) x *Price Criteria*

24.4 Only District personnel will officially score all proposals.

24.5 The Construction Manager shall visit www.EPLS.gov to verify the Contractor is not on the Federal Debar list during the proposal evaluation committee meeting. The CM shall print out this verification and place into the project files for documentation this verification was performed on each project.

24.6 Please refer to **Exhibit 4.4.1** for a sample Debar Verification document for the project files.

24.7 The committee's proposal evaluation scoring is presented to the Board of Trustees by ranking the scores in numerical order and identifying the highest score with the number one (1) and so forth up to the number of proposers submitting on the project.

24.8 Once the Offeror that provides best value to the District is determined, the Architect shall contact this contractor only to initiate negotiation and/or a value engineering exercise per State Law. The results of the proposal evaluation are to remain confidential until after the proposal evaluation committee's recommendation is presented to and/or the Board of Trustees.

Section 25 – Construction Contract Award Recommendation

25.1 The Construction Manager shall review the Architect's Contract Award recommendation letter to the G-PISD and return any revisions to the Architect if applicable. Attached to the letter shall be the proposal tabulation form which also indicates the Proposers' ranking from the evaluation committee. The Construction Manager shall confirm which alternates have been selected and are included in the final contract award recommendation and reflected in the Proposal Tabulation Form. The recommended proposer shall be highlighted in yellow with a green border in the Proposal Tab form. In addition, the alternates that are being accepted shall also be highlighted.

25.2 The Summary shall be submitted to the Board of Trustees with all pertinent information: Bid due date/time, bid opening date/time, committee date/time, firms that are assisting/managing the project, ranking committee members, cost, budget, expected start and completion dates. The proposers will be ranked, in order, with their cumulative totals represented.

25.3 Once the Architect has been reviewed and approved, the Construction Manager, and Purchasing Coordinator shall prepare a memorandum for the proposed contract award recommendation along with the Board Agenda Memo. The Board Agenda memo and agenda backup documentation is typically submitted the Thursday prior to the meeting. The memo must be submitted to the Assistant Superintendent of Business and Finance for review and approval. Upon approval by the Assistant Superintendent, the agenda will be submitted to the Superintendent's office for inclusion on the Board Meeting Agenda. The Construction Manager must adhere to the published board agenda timeline submission requirement deadlines in order for agenda items to be properly presented to the board of trustees for consideration.



TO: (Board President)
The Board of Trustees

FROM: Assistant Superintendent of Business and Finance

DATE: June 25th, 2022

RE: **2022 New School**
GREGORY-PORTLAND I.S.D. PROPOSAL NO. CSP XXXXXXXX
CONSTRUCTION CONTRACT AWARD RECOMMENDATION

The District received a total of ten (10) proposals from interested contractors on Tuesday, June 17th, 2022, for the above referenced project. Attached you will find the proposal tabulation form summarizing the proposals submitted and a recommendation letter from *Sample Architects* dated October June 17th, 2022.

Our department has carefully evaluated the submitted proposals and hereby recommends to the Board of Trustees, to award the construction contract to *Sample Construction* in the amount of \$40,041,000.00. This recommendation is based upon acceptance of Base Proposal, Alternate Proposals 1, 2, 3, 4, 5a, 5b, and 6. The project is being funded from Bond Funds. The scope of work in this project includes the demolition and construction of a new school. *Sample Construction* has the highest ranking based upon the proposed price and scoring of the published criteria and therefore provides the best value to the District.

Sample Construction is a locally based general contractor that has successfully executed numerous construction projects in the Texas Gulf Coast area, including Gregory-Portland Independent School District and other neighboring school districts.

If you should have any questions, please do not hesitate to call.



October 9, 2022

Dr. Ismael Gonzalez
Assistant Superintendent Business and Finance
Gregory-Portland Independent School District
1200 Broadway Ave
Portland, Texas 78374

Re: 2022 New School
Gregory-Portland Independent School District
G-PISD Proposal Number: CSP XXXXXX

Dear Dr. Gonzalez,

On Thursday, June 17th, 2022, competitive sealed proposals were received in the District's Administration Building for the 2022 New School project. Ten (10) offerors submitted proposals as requested. A tabulation of the proposal results is attached.

A Selection Committee made up of District administrators, architects and consultants evaluated the proposals on Wednesday, June 18th, 2022, and ranked them based on the selection criteria published in the Instructions to Offerors section of the Contract Documents.

Sample Architects recommends to the Gregory Portland Independent School District Board of Trustees, the acceptance of the Selection Committee's recommendation to select *Sample Construction* as the Contractor for the 2022 New School project in the amount of \$30,041,000.00, which represents the Base Proposal plus Alternate Proposals 1, 2, 3, 4, 5a, 5b, and 6. All parties teamed with G-P I.S.D. staff to confirm proposals contained fair and accurate pricing, ensuring the maximum value to the District was achieved.

Sample Construction is a local, Texas based general contractor that has successfully executed numerous construction projects for a host of school districts in the Texas Gulf Coast area, including the Gregory-Portland Independent School District.

We would like to express our sincere thanks to you and your staff, the Board of Trustees, Dr. Gonzalez and the Gregory-Portland Independent School District administration staff for allowing us the exciting opportunity to be part of this important project.

We look forward to a successful partnership with the District and *Sample Construction* in the 2022 New School project.

Sincerely,

Principle Architect
Enclosure – Proposal & Evaluation Tabulation Form



PROPOSAL TABULATION SHEET

Proposal Date/Time: Tuesday, June XX, 2018 at 2:00 P.M. Base Proposals / 3:00 P.M. Alternate Proposals

2022 New School Project – Gregory-Portland Independent School District

G-PISD Project No. CSP XXXXXX / Architects Project No. XXXX

	GAMMA CONSTRUCTION	A+ CONSTRUCTION	PRIME CONTRACTORS
PROPOSAL BOND – 10%	Yes	Yes	Yes
BASE PROPOSAL	\$2,724,000.00	\$2,700,000.00	\$2,875,000.00
ADDENDA 1 and 2 – Acknowledged	Yes	Yes	Yes
ALTERNATES			
Alternate No. 1: Remove existing VWC, Prep & Paint Walls at Windfern	\$68,000.00	\$90,500.00	\$30,000.00
Alternate No. 2: New HVLS Fans at Windfern Annex Warehouse	\$68,000.00	\$67,000.00	\$43,000.00
Alternate No. 3: Provide New RTU on Freezer Building	\$68,000.00	\$64,000.00	\$53,500.00
Alternate No. 4: Replace Existing 2 x 2 Metal Halide Light Fixtures in Food Production Atrium	\$21,000.00	\$22,500.00	\$27,500.00
Alternate No. 5A: Provide Lighting Controls at Food Production Center	\$75,000.00	\$43,000.00	\$47,000.00
Alternate No. 5B: Provide Lighting Controls at Windfern Annex	\$50,000.00	\$23,000.00	\$27,500.00
Alternate No. 6: Remove Existing Paint, Prep and Paint Walls at Food Production Center	\$25,000.00	\$31,000.00	\$50,000.00
FINAL BASE PROPOSAL + ALTERNATES 1 through 6	\$3,099,000.00	\$3,041,000.00	\$3,153,500.00
PROPOSER RANK (BID AMOUNT ONLY)	2	1	3

Section 26 – Owner – Contractor Agreement

26.1 G-PISD utilizes the 2017 AIA Owner-Contractor Agreement Forms A101 and A201 (as amended) for construction projects. The District keeps and maintains these documents to ensure consistency across all projects. The Purchasing Coordinator shall make sure the latest versions of the Owner-Contractor agreements (AIA 101 and 201) are included in the construction documents prior to bid.

26.2 The Owner-Contractor Agreement to be executed by the parties must include the following exhibits to the agreement: Submitted Proposal Form, including Alternate Proposals Selected; Special Owner Requirements fully executed; and Documentation of Any Negotiated Items. Upon receipt of proposals and completion of the evaluation process, and after negotiations are finalized, and prior to the Monday night Board Meeting, the Purchasing Coordinator shall prepare a draft of the A101 Agreement with the recommended proposer information.

26.3 Prior to the scheduled Monday night Board of Trustees meeting for contract award, the Purchasing Coordinator shall transmit two (2) original copies of the final G-PISD edited A201 General Conditions for final review and signature. This Agreement shall be executed by the General Contractor and returned back to G-PISD prior to the action meeting of the Board of Trustees. The Assistant Superintendent of Business and Finance will submit the Agreement to the Superintendent to execute the Agreement following the Monday night contract award approval by the Board of Trustees.

26.4 After full execution of the Agreement by both parties, the Purchasing Coordinator shall send a copy of the executed contract to the Construction Manager. One original copy of the fully executed Agreement shall be placed in the project files. The Construction Manager shall ensure the remaining two (2) original documents are transmitted to the Architect's office for further distribution to the General Contractor. The Construction Clerk shall enter a requisition into the financial system for approval. Once the requisition has been approved and a purchase order has been issued, application for payments by the General Contractor can be submitted for approval and processing for payment.

Section 27 – Professional Services

27.1 G-PISD enters into miscellaneous contracts for professional consultant services for the following:

- Geotechnical testing
- Construction material testing
- HVAC test and balance
- Commissioning
- Asbestos abatement monitoring

27.2 The Purchasing Coordinator will prepare the Board agenda item to approve professional service.

27.3 The Construction Manager shall be the POC for the approved service consultant on each project.

27.4 The Construction Manager shall request a proposal for services from each consultant needed on the project. The CM shall send the consultant a set of drawings that are at least 95% complete for the consultant to generate a proposal.

27.5 The Purchasing Coordinator shall then prepare a Board agenda item for the approval of the contract amount for each consultant.

27.6 The Construction Manager shall prepare an Exhibit C to the consultant master agreement for each consultant needed. The Exhibit shall be signed by the consultant and routed for approval after the Board approves the contract amount.

27.7 See **Exhibit 1.6.3** for a flow chart of the Purchase Order Process.

Section 28 – Notice to Proceed

28.1 NTP's – The following shall be the procedure for issuing the notice to proceed after Board approval.

- The morning after the Board meeting the Purchasing Coordinator will process the contracts and send the signed copies to the construction department.
- The construction department will request fund from the business office by sending an email to the Director of Finance that states the amount requested, attaching (or linking to) the signed contract, and adding the G-PISD project number (the last three digits of the account code).
- Once the funds are issued for the project the Construction Clerk will submit the associated requisition.
- Once the PO is approved, the Construction Manager can issue the NTP to the contractor.
- A copy of the PO is to be included with the NTP.
 - This notice includes a provision that the Contractor may not mobilize on site without prior approval of their bonds and insurance certificates by the district purchasing department. It is critical that the Construction Manager monitors requirements to make sure that no site activity, including and contractor mobilization of job trailer, silt fencing, temporary fencing, etc. has commenced on the project site, whether it is a vacant site or an existing facility until bond and insurance approval.

28.2 Please refer to Exhibit 4.8.1 for sample Notice to Proceed to be issued by the District.

(Body of the Email – *Template*)

TO: Contractor

CC: Architect; Project Specialist

Good afternoon,

Please confirm receipt of this email.

The Board of Trustees approved the award of the construction contract for this project (awarded date).

Attached is the Notice to Proceed for your records.

Please submit your insurance, payment and performance bond information as required per the contract documents for verification and approval as soon as possible as this process may take a couple days. If you have specific questions about any of these items, please contact Purchasing at 361-777-1091 or ccasarez@g-pisd.org.

Please begin the background check/badging process immediately. No workers are allowed on site until they are cleared and badged. Badging information is included in the project documents.

The kick off meeting for this project is tentatively scheduled for Date at location. An official meeting calendar invite will be sent out to all parties by Architect.

If you have any questions, please do not hesitate to contact me.

Thanks,

Construction Manager

EXHIBIT 28.2

July 7, 2022

Name

Construction Company Name

Street Address

City, State Zip Code

Re: Project Name

G-PISD Proposal Number: _____

Architect Number: _____

“NOTICE TO PROCEED”

Dear Mr./Ms.,

On Monday, August 10, 2022, the Gregory-Portland Independent School District’s Board of Trustees awarded Construction Company Name the contract for Project Name in the amount of \$0,000,000.00. This amount is based upon the following:

- Base Proposal in the amount of \$0,000,000.00
- Alternates List all Alternates and price
- Addendum (post Proposal and amount)
- Substantial Completion Date: _____

Based on this information, please consider this your “Notice to Proceed”, with the understanding that absolutely **no work** or mobilization can occur at the job site(s) until all required Bonds and Insurance Forms have been submitted in full conformance with the project requirements and approved by Architect and Gregory-Portland Independent School District. You may proceed with all non-site activities, ie: preparation of shop drawings, subcontractors, schedules, acquiring necessary permits, etc.

We look forward to working with you and your team on this project.

Sincerely,
Gregory-Portland I.S.D.

Name, Title

CC: Name



Section 29 – Construction Administration Phase

29.1 The following defines the District's expectations of services performed by the Architect during the construction administration phase of the Project. It is the responsibility of the Construction Manager to ensure that the expectations are met and provided by the Architect.

29.1 Throughout the duration of the construction, the Architect shall visit the site at frequencies required to remain generally familiar of all installations, but in no case, no less than a minimum of one (1) site visit a week. Include all Consultants when appropriate. The Architect shall provide a copy of the field report prepared for each job site visit to the Owner.

29.2 Review all placement of reinforcing steel for compliance with the Contract Documents, which includes checking for supports, size, spacing and type prior to pouring of concrete. Verify that testing lab has been notified of impending placement of concrete.

29.3 Observe placement of all concrete, including flatwork and paving. Coordinate with testing laboratory for verification of slump, test cylinders, compliance with design mix and admixtures. Do not leave site until all concrete has been deposited and finish work has begun.

29.4 Review and coordinate with testing laboratory all excavations to verify compliance with required depths, materials, and compaction of backfill.

29.5 Review all walls installed for plumb, plane and alignment.

29.6 Observe roofing installation as may be required from deck to finish and coordinate with roof inspection services performed by third party on behalf of Owner.

29.7 Civil Engineer shall examine the site work and utility systems installation for compliance with the contract documents. The Civil Engineer shall also review the appropriate material testing lab reports noting any concerns to the Architect and G-P I.S.D. Construction Manager. The Civil Engineer shall forward a copy of a field observation report for each visit to both the Architect and Construction Manager.

29.8 Structural Engineer shall examine erected structural system and coordinate with testing laboratory to verify connections, supports, sizes, spacing and expansion/contraction capabilities of components comply with the Contract Documents. The Structural Engineer shall forward a copy of a field observation report for each visit to the Architect and Construction Manager.

29.9 The Mechanical/Electrical/Plumbing (MEP) Engineers shall examine the mechanical/electrical and plumbing, systems in place prior to coverage by concrete, walls and finishes. Mock-up installations of components shall be utilized where applicable. The MEP Engineers shall forward a copy of a field observation report for each visit to both the Architect and Construction Manager.

29.10 Issue a weekly written status report, describing progress made, problems, potential problems and general communications concerning the project.

29.11 Follow through on warranty work by visiting site to verify if warranty work was completed satisfactorily in accordance with the Contract Documents and notify Owner in writing of such completion.

29.12 The Architect shall prepare all meeting minutes for all meetings throughout the construction process.

29.13 Please refer to **Chapter 1, Section 3**, for the sample Owner-Architect Agreement for the complete list of requirements and expectations of services by the Architect.

29.14 The Construction Department developed three checklists for Project Specialist to use, along with this manual, as a guide before and during a project. Every item on each list may not apply to every project.

See **Exhibit 29.1** for a copy of the PM “Are We Going to Open” Checklist.

See **Exhibit 29.2** for the PM Project Checklist.

Are We Going to Open Checklist

Permits

- Do you have a copy of all required permits?
- County, Building Fire, Fire Sprinkler, Fire Alarm, Card Readers, etc?

Health Inspection? (Do you need C/O first?)

MDF/IDFs room secure?

- Door and lockset with core installed.
- Switch Installation
- Is light installed and working?
- Is power installed and working?
- Is rack installed and bolted to the ground?
- Is room clean?
- Fiber up at DEMARC?
- Contact G-PISD Technology and order telephone lines.
 - 2 for fire alarm, 2 for security, 1 for elevator.
 - Are the telephone numbers labeled at the DEMARC?

Gas Meter

- Has contactor contacted Centerpoint and started the design process?
- Pay fees associated with gas service
- Is the house line within 8' of Centerpoint main stub up?

Back Up Generator

- Has the generator been tested with a full building shut down?

Does all egress lighting come on when generator starts? Exit Lights?

Fire Sprinkler System Is the bell installed outside the fire riser room?

- Does the bell ring with the main drain flows?
- Has the inspector test drain been tested and does the alarm sound?
- Do you have a copy of the permit for the fire sprinkler system? Are the spare heads in the riser room?

Fire Alarm System

- Are all panels labeled with the panel and circuit number that feeds them?
- Do you have a copy of the permit?
- Have the duct detectors been tested?
- Do the air handlers shut down when the system goes off?
- Do all strobes blink and are the synced?
- Can you hear the notification signal in loud areas? Gyms, kitchen, shops, etc?

Keys

- Are knox boxes installed at all required locations?
- Entry, Elevator, Riser Room, Gates
- Do you have building master keys for each knox box?

Cores

- Did you give the G-PISD Locksmith Shop a copy of the final floor plan?
- G-PISD Locksmith Shop to go over keying?

EXHIBIT 29.2
G-PISD PM Project Checklist

TASK

Plat - If Required

Request Plat from Civil Engineer
Route Plat for G-PISD and Board approvals

T&C Package - Centerpoint - If Required

Contact Centerpoint to determine who the service representative is for your project
Gather requested information and return to Centerpoint
Obtain T&C Agreement from Centerpoint and route for G-PISD approvals
Send approved invoice to Accounting for generation of check.
Deliver check to Centerpoint and get receipt
Obtain Blanket Easement Document and route for G-PISD and BOARD approvals

MUD

Request Tap Fee/Other Fee invoice from MUD via civil engineer Pay any required MUD Fee and get receipt

Other Consultants - Do not route Exhibit C for approval until Board approves construction contract.

Materials Testing (MAT):

- Send 95% Drawings to MAT company
- Request a proposal for Construction Material Testing from testing company
- Create MAT Exhibit C and send to testing company for approval
- Request 1295 Form from testing company - If required

Commissioning:

- Send 95% Drawings to Commissioning Company
- Request a proposal for Commissioning from POC
- Create Commissioning Exhibit C and send to company for approval
- Request 1295 Form from Commissioning company - If required

Test & Balance (TAB):

Send 100% drawings to TAB company
Request a proposal for TAB services
Create TAB Exhibit C and send to POC for approval
Request 1295 Form from TAB company - If required

Exhibit 29.2

- Have cores been delivered to G-PISD?
- Have cores been installed at the campus?

Security

- Are all card readers installed and operational?
- Are all cameras installed, aimed and focused?

Intercom/Call PhonesIs the intercom operational?

- Can the intercom be heard in all rooms?
- When a classroom calls the office, does the phone display the room number that is calling?

Bells

- Has the bell schedule been programmed and tested?

Clocks

- Are the clocks installed and working?
- Does the school know how to change the time on the clocks?

A/C

- Can G-PISD view and control all areas of the school A/C system?

District Provided Appliances

- Are all District provided appliances installed and operational?
- Paper Towel, Soap Toilet PaperHave all dispensers been installed?
- Are sanitary napkin dispensers and disposal units required?

Vending Machines

- Are all vending machines installed, stocked and operational? Card Readers, etc.?

Receipt of Proposals

Generate final bid tab
Generate G-PISD recommendation letter
Obtain Architect's recommendation letter
Perform search of recommended proposer on SAM website. Print result.

Construction Contract

Generate draft construction contract and route for G-PISD review - Include source documents
Send approved construction contract to contractor for signatures Route executed construction contract for G-PISD signatures

Month of Board Award

Provide Board information for construction contract to the Business Office
Provide Board information for professional services to Business Office
Provide back up for construction contract Business Office

After Board Award

Generate and send Notice to Proceed to awarded contractor
Request contractor's insurance, bond and badging information
Send insurance and bond information to G-PISD Purchasing Department for approval
Route executed MAT Exhibit C for G-PISD approvals

- Include proposal and 1295 Form and approved budget

Route executed Commissioning Contract Exhibit C for G-PISD approvals

- Include proposal and 1295 Form, and approved budget

Route executed TAB Contract Exhibit C for G-PISD approvals

- Include proposal and 1295 Form and approved budget

Create final budget and route for G-PISD approval

Construction Phase

Obtain and review contractor's schedule of values and construction schedule
Verify that Construction drawings are issued
Send a floor plan to G-PISD Locksmith
Send technology drawings to G-PISD Technology Department

Project Close Out

Complete Form AO Checklist
Complete Close Out Binder
Generate Substantial Completion Form and route for approval

EXHIBIT 29.3

Verify completion of punch list items
Generate Final PCO to zero out PCO Log
Generate Final Project Change Order
Route Final Change Order and Final CPR together for approval
Generate Certificate of Final Completion and route for approval
Generate Final Budget and route for approval

Warranty

Schedule 6- and 11-month warranty walks as needed

Note - Primary responsibility for warranty walks is with the G-PISD Construction Manager



Section 30 – Posted Addenda Sets

30.1 The Architect shall provide posted addenda sets of plans and specifications that shall include all issued addenda. Addendum items shall be clearly identified on the posted set, including the addendum number under which the item was issued.

30.2 As soon as practical, after the award of the Construction Contract by the Board of Trustees, the Architect shall deliver to the Construction Manager:

- One (1) complete set of pdf electronic drawings and specs and all issued addenda

30.3 Additional posted addenda set may be made available to the Architect and Contractor at the Architect and Contractor's sole expense.

30.4 It is recommended that the Construction Manager post the addenda in project files versus waiting for a posted set to be issued by the Architect. This allows the Construction Manager to be very familiar with the addenda items that were included as part of the Contract Documents.



Section 31 - Bonds & Insurance Verifications/Approvals

31.1 Once the District has issued the notice to proceed to the construction contractor, the contractor shall submit all required insurance and bond information per the contract agreement to the Construction Manager.

31.2 The Construction Manager shall be responsible for sending the insurance and bond information to the Purchasing department for review and approval.

31.3 No work shall begin on site, including mobilization, until all insurance and bond information is approved by G-PISD Purchasing department.



Section 32 - Final Projected Cost Budget Worksheet (Modify a Budget) Total Final Projected Cost

32.1 Once all contract amounts for all necessary vendors/consultants/contractors have been determined, the Construction Manager shall prepare and route for review the Total Final Projected Cost worksheet for approval.

32.2 Actual contract amounts shall be inserted in the Total Projected Cost column of the worksheet. Any unused allowances shall be moved to project surplus if the project is under budget or used to minimize the deficit if the project is over budget.

32.3 The Construction Manager shall use their best judgment as to how much money should remain in the Project Reserves box in the worksheet. As a guide, this amount should be approximately 2% of the construction cost.

32.4 The Construction Manager shall make sure no changes are made to the Preliminary Budget Amount that was submitted at the start of the project.

32.5 The Construction Manager shall include a DRAFT copy of the Total Final Projected Cost worksheet, along with the construction and professional services award recommendation information, at the time the project is submitted to the Board for approval. This draft will not have approval signatures at this time.

32.6 Once the Board has approved the construction and professional services contracts, the Construction Manager shall route the Total Final Projected Cost worksheet for signatures as follows:

- Construction Manager
- Assistant Superintendent of Business and Finance
- Superintendent

32.7 The Construction Manager shall include a copy of the construction bid tab and proposals from the professional service providers as back up to the Total Final Projected Cost worksheet.



Section 33 - Pre-Construction Conference

33.1 After the award of the construction contract by the Board of Trustees, The Construction Manager shall schedule a Pre-Construction Conference, to be attended by the District's Construction Department, the Contractor's Project Manager and Project Superintendent, the Architect's Project Manager and Field Representative, and the MEP Consultant's Field Representative.

33.2 The Architect shall prepare the agenda for the Pre-Construction Conference which shall include a detailed review of the Specification Sections related to Special Owner Requirements that address Security Badging requirements, building overtime requests and building rules and regulations applicable to the project. Other agenda items shall include, but not limited to, a review of the project schedule, requirements for submission of the schedule of values, review and approval process for application for payments, daily field reports by GC, meeting minutes, etc. The Architect shall provide a copy of the agenda for review prior to the meeting. The Construction Manager shall review the agenda, make any necessary revisions, and return to the Architect for corrections.

33.3 The CM shall follow up with the Architect to ensure the meeting minutes are typed and submitted to G-PISD. Upon approval by the CM, the minutes shall be placed into the project files by the Construction Clerk.

33.4 The following **Exhibit 5.5.1**, is a sample agenda to be utilized for all G-PISD construction projects. This agenda shall be modified as necessary by the CM and the Architect to specifically address specific project items.



MORE THAN ARCHITECTS

Introduction to Huckabee Construction Services

The goal of this meeting is to set the expectation of what the owner should see from Huckabee during the construction phase. This meeting will explain the responsibilities of the Architect and General Contractor, proper flow of communication amongst the team, and identify specific requirements needed to start the construction phase of the project successfully.

NEWFORMA – PROJECT MANAGEMENT SOFTWARE UTILIZED FOR PROJECT CORRESPONDENCE, TRANSMISSION OF RFI AND RFP INFORMATION, AND ELECTRONIC VIEWING OF ALL PROJECT DOCUMENTATION.

- WHO WILL BE THE DISTRICTS CONTACT FOR HUCKABEE DURING CONSTRUCTION AND HOW INVOLVED WILL THEY BE?

- IS A LAB ON BOARD FOR THE PROJECTS? PROPOSAL RECEIVED/APPROVED?

- PERMIT STATUS?

- ANY SPECIFIC REQUIREMENTS OF THE BOARD UPDATES? DISTRICT/HUCKABEE TEMPLATE?

- ARE THERE ANY SPECIFIC REQUIREMENTS OF THE DISTRICT FOR THE PRE-CONSTRUCTION MEETING?
 - o CORRESPONDENCE/DOCUMENTATION
 - o RFI (~~R~~EQUESTS ~~F~~OR ~~I~~NFORMATION) / RFP (~~R~~EQUESTS ~~F~~OR ~~P~~RICING) REQUIREMENTS / PAYMENT APPLICATIONS

- QUESTIONS ON CONTINGENCY OR HOW CONTINGENCY WILL BE USED? (*ADDED VALUE*)- *CONSTRUCTION ISNT PERFECT*

- IS THERE A SPECIFIC DOLLAR LIMIT WHICH ~~R~~EQUESTS ~~F~~OR ~~P~~RICING CAN BE APPROVED WITHOUT BOARD APPROVAL?

Huckabee

Project Name:
Client:
Project Number:

- HOW SHOULD CLOSEOUT DOCUMENTS BE RECEIVED (DIGITAL/PAPER/BOTH)?

Pre-Construction Conference

Project Name:	New Early Children's Center	Date of Meeting:	April 8 th 2022
Owner:	Gregory-Portland I.S.D.	Time of Meeting:	
Location	Portland, Texas	Place of Meeting:	G-P I.S.D Cons. Office
Project No:	1898-01-01		
Subject:	Introduction to Construction Services		
Present at Meeting:	See Sign in Sheet		
Distribution:			
Submitted By:		Date of Report:	
The following summation represents our interpretation of the items discussed at the referenced meeting. Any persons desiring to comment on or correct the minutes are requested to put their comment in writing to the Architect within 10 days of the date of the report. Otherwise the minutes will stand as written.			

- 1) SELF INTRODUCTIONS OF ROLE AND RESPONSIBILITY
- 2) DISCUSSION OF PROJECT CONCEPT, SCOPE, AND OBJECTIVES
- 3) COMMUNICATIONS
 - A. All official correspondence and direction shall be routed through the Architect's Construction Observer
 - B. The Architect's Construction Observer's role is to:
 1. Serve as the project team point of contact for all requests and to interface with the Owner's direction or decisions
 2. Contact school personnel for request considerations and approval
- 4) CONTRACTOR'S RESPONSIBILITIES
 - A. Project Management
 1. List of Subcontractors
 - a. Provide final list of Subcontractors and Manufacturers
 2. Schedule of Values
 - a. Submit Schedule of Values within twenty-one (21) calendar days of Notice to Proceed date
 3. Construction Schedule
 - a. Graphic projection of construction activities showing anticipated start and completion dates, float times, and critical path sequence
 - b. Shall be submitted within twenty-one (21) calendar days of Notice to Proceed date
 - c. Shall be maintained monthly, submitted with each Pay Application, and posted for reference at jobsite

Project Name:
Client:
Project Number:

4. Submittal Schedule

- a. **Note: Submittal schedule shall be provided no later than the 2nd payment application. If not received and approved by the Architect by this time, 2nd payment application will be held until received and approved.**

- b. Shall be submitted with the Construction Schedule
- c. Include anticipated dates for all required submittals as they coordinate with construction progress

5. Permitting

- a. Contractor responsible for securing all permits (discussion)
- b. How many copies of bid documents does general contractor need? Send request to Crystal Vasquez.

B. Jobsite Management

1. Contractor Superintendent's Role

- a. Be present at site
- b. Coordinate all on-site activities of Subcontractors
- c. Review and approve Subcontractor work prior to Architect/Owner reviews or observations

2. Proper On-site Conduct/Language

- a. Wear appropriate clothing
- b. No tobacco, alcohol or firearms are permitted on school property
- c. Misconduct will constitute grounds for immediate dismissal and removal of offending worker(s) from the jobsite
- d. All workers will pass a background check and wear the appropriate badges
 - i. Review any special requirements with Owner

C. Site Conditions

- 1. Parking
- 2. Storage
- 3. Utilities
- 4. Temporary facilities
- 5. Special site conditions and critical work sequencing
- 6. Phasing

5) DOCUMENTATION AND NOTIFICATION

A. Contractor shall provide the following:

1. Record Set of Documents

- a. Throughout construction, maintain a record set of Drawings and Specifications; begin As-Built Drawings immediately
- b. Plans shall be updated to reflect all addenda, field clarifications, minor changes, and all other approved changes/clarifications
- c. Record Drawings will be reviewed prior to each monthly payment

2. Testing Lab Coordination and Notification

- a. Perform inspections as required by contract documents
- b. Provide 48 hours advance notice to testing lab for scheduled inspections
- c. Provide 48 hours advance notice of concrete pours to Architect
- d. All concrete pours shall be made in the presence of Testing Lab
- e. All cost for failed tests shall be borne by the Contractor including Retesting Costs and Architectural or Engineering Analysis

3. Energy Code Compliance Inspections

- a. Contractor is responsible for contacting the Energy Code Compliance agency for periodic Architect's Consultant inspections as required

4. Observations: Coordination and Notification (Structural, MEP, Civil, Food Service, Technologies, etc.)

- a. Observations as required by contract documents shall be reviewed by Architect and/or Consultant, as appropriate
- b. Provide 48 hours advance notice to all parties for such observations

Project Name:
Client:
Project Number:

6) PROGRESS MEETINGS

A. Jobsite Initial Meeting

1. Meet with City Inspection Department to establish procedures
2. Observe all city regulations regarding noise, traffic, etc.

B. Meeting Schedule and Agenda

1. Establish location, date, and time
2. Contractor prepares agenda
3. Contractor prepares previous meeting's minutes and includes them as part of the current meeting's agenda Architect and School Personnel shall submit amended notes in writing if necessary.

C. Job Progress Meetings

1. Held to discuss overall job progress, coordination, schedule and anticipated conflicts
2. To be attended by Owner Representative, Contractor, Architect; Subcontractors and/or Consultants will attend only as required
3. Frequency of the meetings is dictated by progress of the project
4. Interim meetings may be scheduled as required

D. During the meeting

1. Contractor's Responsibilities:
 - a. Conduct the meeting
 - b. Keep minutes
 - c. Distribute attendance sheet
2. Topics of Discussion:
 - a. Approval of previous meeting minutes
 - b. Coordination of self-performed work by Owner
 - c. Project progress and schedule
 - d. Potential or existing problems
 - e. Review Record Drawings
 - f. Procedures to regain planned schedule, if necessary
 - g. Review RFI status
 - h. Review RFP status
 - i. Review Submittal log
 - j. Quality control
 - k. Safety issues
 - l. Time extensions and weather day requests
 - m. New business
 - n. Review Applications for Payment
 - o. Change proposal/Change order status
 - p. Electronically signing items

E. Pre-Installation Meetings

1. Contractor shall schedule Pre-Installation meetings as required in individual specification sections
2. All work that takes place prior to this meeting will be subject to removal at the Contractor's expense. Refer to specification Section 01 3100 for additional information.

7) SUBMITTALS/SUBSTITUTIONS

A. Submittals

1. Contractor shall review, coordinate, and stamp submittals indicating compliance with all construction requirements before transmitting to Architect for review via Newforma as stated within the Specifications
2. Submittals required for review are listed in the Project Manual in Section 01 3000
 - a. Submittals sent which are not required per the approved Architectural Submittal Schedule will not be reviewed by Architect and shall be reviewed by Contractor. Provide as specified.
 - b. MSDS (Material Safety Data Sheets) are not reviewed and should not be included in submittals.
3. All Submittals must contain the following information:
 - a. Project Name and Project Number

Project Name:
Client:
Project Number:

- b. Division Number
 - c. Description of Product Data and/or Shop Drawings
 - d. Contractor's stamp of review
4. Contractor shall maintain a complete set of submittals and review status at the jobsite
5. **Contractor shall submit required submittals to Architect for review via Newforma website listed below** (a. below). Contractor will be issued a log-in credentials and instructions. Please submit the names and email addresses of all individuals who will need access.
 - a. www.newforma.huckabee-inc.com/userweb/login
6. Contractor uploads pdf submittal to Newforma website and will email directly from Newforma. All submittals shall be uploaded to the Newforma website, individually, as pertaining to each specification section. Multiple architectural submittals shall not be included in a single file that is uploaded to the Newforma website. Check MEP and Kitchen Equipment specifications for 'grouping submittals' adherence.
7. Steps to accessing Newforma and submission of required submittals are as follows:
 - a. Use your internet browser to navigate to the following address: [https://newforma.huckabee-inc.com/userweb/login](http://newforma.huckabee-inc.com/userweb/login)
 - b. Contractor issues submittal utilizing csa_c@huckabee-inc.com via Newforma notifying the Administrator **and** Construction Observer of its availability. **(Email subject must contain project number, specification section number and description of contents as stated below.)**
 - a. Additionally, the GC may navigate to the Huckabee website (<https://www.huckabee-inc.com/>), locate and select the "Construction" tab at the top of the screen and then select the "Newforma Login" button on the following screen.
 - c. After submittal is completed, Administrator will notify the contractor via email that the submittal can be downloaded from the Newforma website.
8. Contractor shall maintain schedule logs for weekly updates and review
9. Under no circumstances shall concrete be placed prior to receipt of approved Shop Drawings
10. If Submittal Schedule changes, Contractor must send updated schedule to the Construction Observer

B. Substitutions

1. Product substitutions MUST COMPLY with all post contract award articles of specification Section 01 2500 and the General Conditions of the Contractor for Construction.
2. If applicable, Contractor shall submit a Substitution Request form, located on the Architect's website, and provide documentation that the proposed product complies with the specified product's quality, performance, and warranty.

C. Electronic Drawings

1. Architect will provide an electronic file release form for the Contractor's signature. Upon execution of agreement, Architect will provide one (1) electronic copy of the master floor plan at no charge within five (5) working days.
2. Refer to specification Section 01 3000 for additional information

8) PROJECT ADMINISTRATION

A. Request for Information (RFI)

1. All questions regarding the construction documents or Contractor proposals shall be submitted from the General Contractor to the Architect on an RFI form via Newforma. RFIs shall be numbered sequentially and shall include only one question or related question per RFI.

B. Request for Pricing (RFP)

1. Issued by the Architect to the Contractor for pricing. The Contractor shall submit back to the Owner and Architect, within fourteen (14) calendar days, his itemized price and time (if any). Owner will review Contractor's price and decide if the RFP is accepted or rejected. Contractor shall not proceed with the proposed revisions until the Owner has approved the work.

C. Change Order

1. Issued by the Architect or Contractor for acceptance by the Owner. Only fully executed Change Orders may be included on Application and Certificate for Payment.

D. Application and Certificate for Payment: draft review, routing, and dates for completion

Project Name:
Client:
Project Number:

- a. **Note: Submittal schedule shall be provided no later than the 2nd payment application. If not received and approved by the Architect by this time, 2nd payment application will be held until received and approved.**
1. Shall be submitted to the Architect by the 25th of each month
 2. Shall be processed in accordance with District Payment Schedule
 3. Use AIA form G702 and G703 (form G702/CMA is not acceptable)
 4. Progress payment for materials will be based on materials that are properly stored on site (no payments will be authorized for materials stored off-site)
 5. RFPs are not to be added to the Application for Payment until they have been approved by the Owner and Architect and incorporated into a Change Order
 6. As stated in 01 3000, the first and final payment application is required to be hard copy for authentication purposes. All other applications for payment may consist of electronic PDF files bearing original signatures and stamps. The applications shall be submitted to csa_c?@huckabee-inc.com via **Newforma as a Submittal**, notifying the Administrator **and** Construction Observer of its availability. Upon completion, Administrator will notify the contractor via Newforma generated email that the application for payment can be downloaded from the Newforma website.

9) PROJECT CLOSEOUT

- A. Once 75% project completion is obtained, based on the payment application, a meeting will ensue with the Warranty and Closeout Specialist to discuss the expectations for closeout submittal from the General Contractor.
- B. 60 Days prior to Substantial Completion the General Contractor will notify the Warranty and Closeout Specialist of the status and progress of the requirements set forth in 01 7000 – 3.16 Closeout Procedures and the estimated date for preliminary Architectural review.
- C. Contractor Punch List
 1. To be completed by Contractor before Architect review and issuance of Substantial Completion Form
 2. Architectural punch list will be completed via Newforma and distributed to the General Contractor once complete and issued as backup to the AIA Substantial Completion document.
- D. Substantial Completion Requirements
 1. Closeout Procedures (Section 01 7700) and Closeout Submittals (Section 01 7800)
 2. Complete and finalize TAB report, approved by Owner/Architect
 3. DDS controls completed, along with all graphics required
 4. Air quality test report
 5. Data wiring testing
 6. Electrical testing
 7. Final Energy Code Compliance Inspection
 8. Final Inspections by governmental agencies including Fire Marshal and Health Department
 9. Certificate of Occupancy from City Municipality
- E. Lien Releases
- F. Compile notebook for MSDS Sheets
- G. Warranty Requirements

ADDITIONAL COMMENTS

Section 34 – Applications for Payment/Invoices

34.1 The Contractor is required to submit applications for payment on AIA Form G702, Contractor's Application and Certificate for Payment with AIA Form G703, Continuation Sheet.

34.2 A detailed breakdown of the Contract Sum showing values allocated to each of the various parts of the Work (by CSI divisions), including a materials and labor breakdown for each item; (refer to Section 01370, Schedule of Values; A101 – Article 5; Section 01020 (Allowances) must be submitted by the General Contractor for review and approval by the Architect, and the Construction Manager prior to the issuance of the first application for payment.

34.3 The schedule of values process includes the following steps:

1. The district's Construction Manager, Architect/Engineer, and the Contractor will review a draft copy of the Contractor's submitted breakdown and discuss the requirements of the schedule of values.
2. The district's Construction Manager has the option to request copies of the subcontracts and other backup data from the Contractor to substantiate the sums described.
3. The Contractor shall revise the draft copy of the schedule of values and resubmit it to the Architect for review.
4. The Architect/ Engineer shall review the document for compliance with the previous meeting and submit it to the Owner for final review and acceptance.
5. The district's Construction Manager shall then submit the proposed schedule of values to the following with a status sheet for final approval:
 - Assistant Superintendent of Business and Finance
6. The district's CM shall return a copy of the schedule of values to the A/E with all comments that need to be corrected or for approval. The CM shall verify the first application for payment has the approved schedule of values included prior to completing the next step listed below.
7. The district's CM shall send a copy of the final SOV to the Assistant Superintendent of Business and Finance for processing.

34.4 The application for the payment process includes the following steps:

1. The Contractor will review a draft copy of each application for payment with the A/E's field representative and the district's CM at the project site during the last week of



each and every month. The CM shall obtain a schedule from the General Contractor of these review dates.

2. During the review the district CM shall ensure the following are reviewed, current, and confirmed;
 - a) Approved CPR's are listed and funded when complete.
 - b) Lien releases are provided for notices listed on the Lien Log.
 - c) Stored material invoices shall match up with items requested.
3. The Contractor transmits one electronic copy of the application for payment (revised, if required, in accordance with the draft application review meeting) to the A/E. The Contractor is also required to submit one copy each of an updated construction schedule, construction photographs (including digital file copies) and aerial photographs, and a completed checklist and sign-off form. Beginning with the second application for payment, the Contractor must include a "Waiver and Release of Lien Upon Progress Payment" for each subcontractor and major supplier on the standard form included in the Project Manual documenting amounts paid from the previous application for payment.
4. The Contractor may include in his application for payment, the cost for materials suitably stored on the project site. Applications for payment that include stored materials must be accompanied by invoices for the materials that itemize the cost(s) for the stored materials. The total of the invoice(s) must equal or exceed the amount applied for as stored materials. The stored material/invoices must be viewed and verified by the A/E.
5. The Contractor may include in his application for payment, the cost for materials suitably stored off-site, provided that the following conditions are met:
 - a. The location must be agreed to, in writing, by the Owner and the Surety.
 - b. The location must be a bonded warehouse.
 - c. Surety must agree, in writing, to each request for payment.
 - d. The Contractor must bear the cost of the Owner and A/E expenses related to visiting the off-site storage area.
 - e. Submission of bills of sale or such other procedures satisfactory to the district to establish the district's title to such materials or equipment or otherwise protect the district's interest, including applicable insurance (naming the District as insured) and transportation to the site for those materials and equipment stored off the site.
 - f. The value of stored materials must be listed under the Store Materials Column and not in the Work in Place Column (No Exceptions).
6. The Contractor is permitted to bill for supervision and overhead & profit based on the percentage of construction completion. Billing for these items based on equal payments over the anticipated Contract Time is not acceptable. The Percentage

Billing for the Contractor shall not exceed the amount percentage of completion of the project.

7. The Contractor's signature on the application must be notarized.
8. The district requires the Architect to certify the application with the signature of a registered AIA Architect.
9. The Architect transmits one copy of the certified application for payment to the district's CM. Certified applications for payment received by the district shall be paid within 30 days of that application or as otherwise stated in the associated contract.
10. The Architect is expected to maintain a log of applications for payment, an updated copy of which should be included in the monthly Project Status Report.
11. Failure on the part of the General Contractor to provide a lien release, shall result in the non-payment of a particular line item, division, or even the entire application for payment. This must be monitored and maintained by the CM.
12. Assuming no errors were found, then the application for payment shall be routed to the CM for final check and signature. The CM is required to ensure all of the items (1-10 listed above) are completed and accurate. The CM shall ensure any deviation is corrected immediately or shall inform the Contractor and Architect that the application for payment is rejected and shall be returned for correction.
13. The General Contractor shall provide a project schedule with the monthly pay application. The CM shall verify that the schedule accurately reflects the progress of the project. If it does not, the contractor shall provide a written plan to get the project on schedule.
14. The CM shall route the application for payment as follows:
 - Construction Manager
 - Assistant Superintendent for Business and Finance
 - Superintendent (\$50,000 and above and retainage requests)

34.5 The CM and the Purchasing Coordinator shall be responsible for making sure payments to all vendors are made in accordance with the Texas Prompt Payment Act.

Invoices

34.6 Invoices from vendors shall be routed for approval per the approval process

When an invoice is rejected, the reason the invoice was rejected, the date the vendor was notified the invoice was rejected, and the name and date of the person that rejected the invoice shall be noted. Revised invoices submitted by the vendor shall be dated appropriately.



34.7 The purchasing Department will ensure that all invoices received are date stamped in a location where the date would be legible, and ensure the date is correct before stamping the invoice.

34.8 It shall be the responsibility of Purchasing Department to periodically review aging reports to ensure prompt payment.



Section 35 – Shop Drawings

35.1 The Specifications must require the Contractor to forward to G-PISD one (1) copy of each submittal; including product approvals and shop drawings, simultaneously with their submittal to the Architect. Ideally, G-PISD should/shall not accept any submittal for review unless thoroughly reviewed and commented on by **BOTH** Architect and General Contractor. However, on a case-by-case basis the CM may elect to have G-PISD review submittals at the same time the Architect is performing their review should the project schedule deem necessary.

35.2 The District may elect to address certain concerns regarding the submitted material, including manufacturer, colors, detail, or other matters.

35.3 The district's Construction Manager is responsible for reviewing the submittals in detail prior to routing the submittal to the appropriate District support department Manager/Supervisor/Technician for their review and comment:

- Maintenance
- Food Service
- Technology
- Transportation
- Custodial Services
- Safety and Security
- CTE
- Executive Director of Leadership
- Athletic Director

35.4 Specific "long lead time" items shall be tracked closely by the CM. These items shall receive priority during the submittal process. Additionally, the contractor may be required to provide a copy of the respective purchase order, bill of lading, etc., to verify items have been ordered so those appropriate timelines are met. Items to be tracked closely include, but are not limited to, the following:

- a. Lockers
- b. Casework
- c. Bleachers
- d. Doors and Hardware
- e. Electrical Switchgear
- f. Chillers
- g. Cooling Towers
- h. Canopies
- i. Coolers/Freezers
- j. Windows and Glass



35.5 The district's CM is responsible for following up with the Maintenance Department or other district support departments to obtain review comments. The CM is responsible for ensuring their comments and the comments from the maintenance department are returned to the Architect within ten (10) working days after their receipt of the submittal, allowing the Architect to incorporate the district's review comments into the submittals returned to the Contractor.

35.6 It is critical that the CM along with the appropriate Maintenance Department trade perform a detailed review of the submittal and submit any comments within the stipulated time period for submission by the Architect back to the Contractor. This is typically the last opportunity to catch any mistakes related to the scope of work, manufacturer, the model number specified, installation details, etc. prior to fabrication and installation of such products or systems for the products. CM should review the Consultants' comments prior to the Architect sending them to the Contractor.

35.7 If a response from the Maintenance and other Support Departments is not received by seven (7) days after their receipt of the submittal, the district's CM shall advise the Maintenance Director that the submittal has not been received and that it is due in three days.

35.8 If a response is not received by the end of the tenth day after the district's receipt of the submittal, and if the submittal is time-critical, the CM shall release the submittal to the Architect for transmission to the Contractor, which should include any comments from the CM. The CM shall notify the Maintenance Director, via email, of such action.

35.9 The Architect shall maintain a shop drawing submittal log and keep it up to date throughout the construction process. This log shall be submitted to the District and the General Contractor as part of the weekly construction progress meetings and shall be reviewed weekly with the Project Team.

Section 36 – Project Change Orders (PCO Approval)

36.1 All proposed changes that will require adjustments in cost and/or time shall be described and issued to the Contractor in a standard Project Change Order (PCO) form provided by the Architect. PCOs shall be numbered sequentially and shall be logged by the Architect.

36.2 Prior to the time the PCO is transmitted to the Contractor, the Architect shall transmit the PCO under separate cover to the district's Construction Manager. The cover letter shall clearly identify the PCO and shall describe the reasons for its issuance. Architect and Owner shall agree that this should be a PCO item and shall also agree whether or not this was an error/omission on the part of the A/E or Owner and the log shall reflect such responsibility.

36.3 The Architect shall transmit the PCO to the Contractor, requesting a detailed materials and labor cost breakdown for performing the work described in the PCO. PCO pricing should be returned within seven (7) days from the Contractor to the Architect for review.

36.4 The Architect and appropriate consultant shall review the cost submitted by the Contractor. The Architect shall ensure;

- **A detailed labor and materials cost breakdown provided. Lump-sum numbers are not acceptable and must be broken out to describe what the district is paying for in the proposed change.**

- The Contractor's pricing summary matches the cost proposed by each subcontractor or supplier.

- The math in the subcontractor's or supplier's proposal is correct.

- Mark-up by subcontractors does not exceed 15%.

- Mark-up by subcontractors for work performed by sub-subcontractors does not exceed 10%. The sub-subcontractor's markup shall not exceed 15%.

- The Contractor's pricing summary shall not include any Contractor's overhead and profit mark-up. In submitting the Base Proposal, the Contractor is required to include the Contractor's overhead and profit for all allowance amounts.

36.5 The Architect shall transmit each PCO separately under a cover letter describing the reason for the proposed change and include a statement that the pricing submitted by the Contractor has been reviewed by the Architect and their Consultants, as applicable, and the Architect recommends acceptance of the pricing to the district.

36.6 Once the pricing has been submitted at a cost the Architect believes is a fair value for the proposed work, the Architect shall then review the proposed PCO with the District CM. If the CM agrees with the pricing, the PCO shall be sent for approval to the Assistant Superintendent of Business and Finance. **Any PCO that exceeds \$10,000 must also be reviewed and approved by the Superintendent.**

36.7 The CM and Architect shall be responsible for making sure all pricing is in line with unit prices provided in the contract documents for all items where a unit price is provided. Should a—



special condition exist where the unit price is not applicable, a detailed explanation and justification shall be provided for review by the CM.

36.8 Upon agreement between the Architect and Owner the pricing is acceptable, the PCO document can be executed by the District as well as the Architect and General Contractor for final approval.

36.9 The final executed PCO shall be distributed back to the Architect and General Contractor as authorization to proceed with the work.

36.10 Once the work has been authorized and the work is partially or totally completed, the Contractor can then include such completed work in the next Application for Payment for approval and payment.

36.11 The CM shall diligently follow up on the status and processing of all PCOs to ensure the project is not being delayed as a result of the PCO review and approval process.

36.12 The Architect shall maintain a log of PCOs at all times which shall be reproduced and distributed to the project team for review and discussion during project meetings. A copy of the most recent PCO log shall be included with each PCO.



Section 37 – Job Progress Meetings

37.1 In general, job progress meetings (Owner, A/E, and Contractor) shall be held at least bi-weekly and shall continue until all punch lists, DRL items, and Commissioning items are completed and signed off. It is the primary responsibility of the G-PISD Construction Manager to attend these meetings.

37.2 The A/E shall preside over the job progress meeting. The A/E shall provide an agenda for the meeting as well as a sign in sheet to be signed by all in attendance.

37.3 Minutes from the meeting shall be distributed to the team within three (3) days of the meeting.

37.4 The construction schedule, overall job progress, submittals, PCOs, RFIs and other relevant issues shall be discussed at the meeting.

37.5 The Architect, G-PISD CM, Contractor Project Manager, and Contractor Jobsite Superintendent are required to attend all meetings. Other attendees shall be determined as needed.

37.6 The primary responsibility to attend OAC meetings rests with the Construction Managers and secondly with the Project Specialist. During the course of a project, a CM may ask a Director to attend an OAC meeting to address a specific issue. In these cases, the Director will attend the meeting, to not only help resolve the issue at hand, but also to check in on the overall status of the project.

If a particular project is having repeated issues, i.e., constantly behind schedule, unresponsive contractors and/or subcontractors, repeated procurement problems, etc., a Director may attend OAC's for these projects on a regular basis until the project is back on track.

Section 38 – Punch Lists

38.1 The A/E shall be responsible for coordinating and tracking all punch lists.

38.2 Punch lists shall be generated by the following groups, as applicable for the project:

- General Contractor
- Architect
- MEP Engineer
- Structural Engineer
- Civil Engineer
- Sports Engineer
- Food Design Professionals
- Pool Consultant
- TAB DRL
- Commissioning CxL
- MAT Deviation Log
- G-PISD Maintenance
 - Electrical ○ Plumbing ○ Mechanical ○ Trades ○ Hardware ○ Low Voltage
- G-PISD Technology
- G-PISD Athletics
- Other groups as needed

38.3 The Contractor shall be responsible for addressing each item on the punch list. Should the Contractor feel a punch list item is not their responsibility, the item will be discussed between the Contractor, Architect and G-PISD CM.

38.4 The Final Signed-Off Punch Lists shall be organized as follows:

Architectural – Once all architectural punch lists items are signed-off, the architect shall write a letter stating that all architectural items have been completed. This cover letter shall be signed by the Architect, Owner and General Contractor. The backup to this letter shall be the entire architectural punch list with architect, owner, and GC initials on each line item on this punch list. The letter and the punch list need to be combined into one pdf document before saving to the project files.

Engineers – Once all engineer punch lists items are signed-off, the engineer shall write a letter stating that all engineering items have been completed. This cover letter shall be signed by the Engineer, Owner and General Contractor. The backup to this letter shall be the entire engineer punch list with the engineer, architect, owner, and GC initials on each line item on this punch list. The letter and the punch list need to be combined into one pdf document before saving to the project files.



Consultants – (Examples: DBR, B & S, SOB, FDP, etc.) Once all consultant punch lists items are signed-off, the consultant shall write a letter stating that all of their items have been completed. This cover letter shall be signed by the Consultant, Architect, Owner and General Contractor. The backup to this letter shall be the entire consultant's punch list with consultant, architect, owner, and GC initials on each line item on this punch list. The letter and the punch list need to be combined into one pdf document before saving to the project files.

Section 39 – Owner Training and Witnessing

39.1 The Construction Manager shall be responsible for ensuring all required owner training and witnessing is performed and the proper groups/people attend these events.

39.2 Witnessing of any work/activity/training in no way relieves the A&E team from their inspection/monitoring responsibilities.

39.3 Refer to below list of owner training and witnessing items.

REQUIRED OWNER TRAINING FOR G-PISD DEPARTMENTS

<p>IP CAMERA SYSTEM MOTORIZED BLEACHERS ROLL UP DOOR OPERATION FOLDING PANEL DOOR OPERATION OPERATION OF BASKETBALL GOALS AIR COMPRESSOR DUST COLLECTOR ACOUSTIC SHELLS FIXED AUDITORIUM SEATING KITCHEN EQUIPMENT IRRIGATION CONTROLS BOILERS CHILLERS COOLING TOWERS BUILDING MANAGEMENT SYSTEM CHILLER WATER TREATMENT SYSTEM CULINARY ARTS APPLIANCES AND EQUIPMENT ATHLETIC APPLIANCES AND EQUIP ANSUL SYSTEM</p>	<p>FIRE SPRINKLER/FIRE PUMP GENERATOR/EMG LIGHTING ALL SCOREBOARDS CAFETERIA SOUND SYSTEM GYM SOUND SYSTEM AUDITORIUM SOUND SYSTEM STAGE/THEATER LIGHTING SYSTEM ATHLETIC FIELDS PA SYSTEM TEACHING THEATER SOUND SYSTEM SOUND REINFORCEMENT (ALL OTHER) DOMESTIC BOOSTER PUMPS/SURGE TANKS LIFT STATIONS WATER HEATERS WATER SOFTENERS SWIMMING POOL SYSTEMS SWIMMING POOL TIMING DEVICE FIRE ALARM MASTER CLOCK SYSTEM INTERCOM SYSTEM</p>
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Section 40 – Substantial Completion

40.1. Per the AIA A201 Document, the following items are a partial list of requirements, as applicable to the Project, that must be completed prior to the established Substantial Completion. This is not intended to be an exhaustive list, but a guideline:

1. All fire alarm system components must be completed and demonstrated to the Owner.
2. All inspections by government authorities having jurisdiction over the project must have been finalized, any remedial work required by them must have been completed, and Certificates of Occupancy, local fire marshal and health department approval certificates and similar governmental approval forms must have been issued and copies delivered to the Owner and Architect.
3. All exterior clean-up and landscaping must be complete, including required stand of grass mowed, edged, weeded, and fertilized.
4. All interior shall have been completed and cleaned except minor items which, if complete after occupancy, will not, in the Owner's opinion, cause interference to the Owner's use of the building or any portion thereof. Contractor shall provide list of these specific items, which include punch list and completion items. A significantly large number of items to be completed or corrected will preclude the Architect from issuing a Certificate of Substantial Completion. The Owner and Architect shall be the sole judge of what constitutes a significantly large number of items.
5. All third-party HVAC air and water balancing must be complete.
6. All energy management systems must be complete, fully operational and demonstrated to the Owner, with graphics transferred to the main server.
7. All emergency/standby generator and low voltage lighting control systems must be complete, fully operational and demonstrated to the Owner.
8. All security systems including intrusion alarm system and closed-circuit television systems must be complete, fully operational and demonstrated to the Owner, and must be monitorable from the District's central Police/Security Center.
9. All school communications equipment, telephone systems and P.A. systems must be complete and demonstrated to the Owner.
10. All final lockset cores must be installed and all final Owner directed keying completed.
11. All room plaques and exterior signage must be complete.
12. All Owner demonstrations must be completed including kitchen equipment, HVAC equipment, plumbing equipment, and electrical equipment and all life safety systems.
13. A final certificate of occupancy must be signed by the Contractor and delivered to the Owner.
14. All operation and maintenance manuals are delivered digitally and approved by Architect and Owner.
15. Health Department Inspections and Municipal Utility District (MUD) and Drainage District and County approvals must be provided.
16. All other reports, testing results, certifications, studies, etc. required by Contract Documents.

All items listed above shall be complete prior to granting substantial completion, unless a specific exception is granted. All exceptions will be documented and agreed upon by the CM and the Assistant Superintendent of Business and Finance.

- 40.2 The District shall prepare the Certificate of Substantial Completion document. This document shall include all punch lists attached. Should it not be practical to include a lengthy punch list with this document, the CM shall note the punch lists is available on the project management software. The CM shall review this draft of the Certificate of Substantial Completion and all attachments prior to the issuance to the General Contractor. Upon approval of the draft document by the CM, the District shall issue three (3) originals of the Certificate of Substantial Completion with all attachments to the General Contractor for approval and execution. The final document shall be issued to the General Contractor. Once the Contractor and Architect have executed the document, the CM shall route the document for approval by the Assistant Superintendent for Business and Finance.
- 40.3 The CM shall provide the following information to the Assistant Superintendent of business and Finance for Risk Management purposes.
- Effective date of adding the location (Substantial Completion date)
 - Name of the new school
 - Exact Address
 - Number of buildings
 - For each building, I will need the following:
 1. Number of stories
 2. Square Feet
 3. Construction description: Masonry non-combustible...i.e.
 4. Roof description
 5. Occupancy: Classrooms; cafeteria; labs; Gym, etc.
 6. Protected with sprinkler system: yes or no
 7. Building Value
 8. Contents Value
 9. Outdoor values (Signs, Scoreboards, fences, light poles....i.e.)
- 40.4 If the General Contractor has not completed the project by the established date listed in the contract documents, the CM shall have the Architect issue a letter notifying the General Contractor that they may be subject to liquidated damages as stipulated in the contract documents. The CM shall have the General Contractor submit a letter of explanation for completing the project after the established date listed in the contract documents for consideration justifying any delays that may have been incurred. The CM shall present both letters to the Assistant Superintendent of Business and Finance for review and consultation. If the justification is accepted by the project team, the new substantial completion date will be documented via Project Change Order. If no time extensions are granted by the project team or some time extensions were agreed upon, but the end result is still beyond the revised completion date, a decision must



- be made as to whether or not liquidated damages will be assessed to the General Contractor. The Architect shall submit a formal recommendation to the District for review by the CM and the Assistant Superintendent. The Assistant Superintendent shall submit a final recommendation to the Superintendent regarding the assessment of liquidated damages for final approval. The final decision as to whether or not liquidated damages are assessed to the General Contractor shall be the decision of the Assistant Superintendent and based upon recommendations by the Architect.
- 40.5 At no time shall the CM or Architect hold the issuance of the Certificate of Substantial Completion as leverage for any contractor performance related issues. Once the project has been deemed substantially complete, the Certificate must be issued and fully executed as quickly as possible.
- 40.6 The contractor shall maintain Builder's Risk coverage on the project until the project is contractually substantially complete.
- 40.7 See Exhibit **40.1** for a sample Substantial Completion Document.



Exhibit 40.1

AIA® Document G704® – 2017

Certificate of Substantial Completion

PROJECT: <i>(name and address)</i> Gregory-Portland Independent School District Administration Relocation Portland, Texas	CONTRACT INFORMATION: Contract For: CSP #2021-02 Project Number: 01898-03-01 Date: August 13, 2021	CERTIFICATE INFORMATION: Certificate Number: 001 Date: December 14, 2021
OWNER: <i>(name and address)</i> Gregory-Portland Independent School District 608 College Street Portland, Texas 78374	ARCHITECT: <i>(name and address)</i> Huckabee & Associates, Inc. 9830 Colonnade Boulevard Suite 130 San Antonio, Texas 78230	CONTRACTOR: <i>(name and address)</i> Weaver & Jacobs Constructors, Inc. 301 Cooperative Way Cuero, Texas 77954

The Work identified below has been reviewed and found, to the Architect's best knowledge, information, and belief, to be substantially complete. Substantial Completion is the stage in the progress of the Work when the Work or designated portion is sufficiently complete in accordance with the Contract Documents so that the Owner can occupy or utilize the Work for its intended use. The date of Substantial Completion of the Project or portion designated below is the date established by this Certificate.

(Identify the Work, or portion thereof, that is substantially complete.)

Project Completion, Entire: All scopes of work are complete as stated and shown in the contract documents.

Huckabee & Associates, Inc.	-See attached digital signatures page-	Jeffrey Rodriguez, AIA	November 10, 2021
ARCHITECT <i>(Firm Name)</i>	SIGNATURE	PRINTED NAME AND TITLE	DATE OF SUBSTANTIAL COMPLETION

WARRANTIES

The date of Substantial Completion of the Project or portion designated above is also the date of commencement of applicable warranties required by the Contract Documents, except as stated below:

(Identify warranties that do not commence on the date of Substantial Completion, if any, and indicate their date of commencement.)

All warranties shall commence on date stated above.

WORK TO BE COMPLETED OR CORRECTED

A list of items to be completed or corrected is attached hereto, or transmitted as agreed upon by the parties, and identified as follows:

(Identify the list of Work to be completed or corrected.)

Work to be completed as shown in attached backup documentation.

The failure to include any items on such list does not alter the responsibility of the Contractor to complete all Work in accordance with the Contract Documents. Unless otherwise agreed to in writing, the date of commencement of warranties for items on the attached list will be the date of issuance of the final Certificate of Payment or the date of final payment, whichever occurs first. The Contractor will complete or correct the Work on the list of items attached hereto within Thirty (30) days from the above date of Substantial Completion.

Cost estimate of Work to be completed or corrected: \$5,000.00

The responsibilities of the Owner and Contractor for security, maintenance, heat, utilities, damage to the Work, insurance, and other items identified below shall be as follows:

(Note: Owner's and Contractor's legal and insurance counsel should review insurance requirements and coverage.)

Security, maintenance, heating, cooling, utilities, damage to the Work and insurance shall be the responsibility of the Owner.

The Owner and Contractor hereby accept the responsibilities assigned to them in this Certificate of Substantial Completion:

Section 41 – Certificate of Project Compliance

- 41.1 The CM is required to ensure that the Certification of Project Compliance form has been completed. This document must be submitted and executed after each of the following project phases has been completed:
- Completion of the Design Development Phase. The CM shall ensure line number 3 has been signed and dated by the Assistant Superintendent of Business and Finance.
 - Completion of the Construction Document Design Phase and the project has been released for pricing. The CM shall ensure line number 4 has been signed and dated by the Architect / Engineer.
 - Substantial Completion of the Construction Phase. The CM shall ensure line number 5 has been signed and dated by the Contractor.
 - Final Completion of the Entire Project. The CM shall ensure line number 6 has been signed and dated by the Superintendent.
- 41.2 Please refer to **Exhibit 5.14.1** for a sample of the Certificate of Project Compliance document fully executed.

Section 42 - Utility Changeover

- 42.1 Once the District has agreed upon and accepted the Date of Substantial Completion for the project, the Project Specialist shall coordinate with the Maintenance to have all utilities (Gas, Water and Electricity) switched over from the General Contractor's name to G-PISD. Please note that this change over can take from one to two weeks to accomplish. Once an effective date has been established with the utility company as to the transfer of such utility, the Project Specialist shall obtain a copy of the first bill that G-PISD received from the utility company and work with maintenance to calculate the dollar amount owed by the district to the Contractor for any days after the established date of Substantial Completion the account remains in the General Contractor's name.
- 42.2 At no such time shall the District accept the responsibility of the utility costs prior to the acceptance of Substantial Completion for the project.
- 42.3 When the District moves into a facility or portion thereof and the General Contractor has not met the terms and conditions of the construction contract to meet substantial completion, the utilities shall remain the responsibility of the General Contractor until such time the District accepts the project as substantially complete. The CM shall issue a letter to the General Contractor to clearly indicate the responsibility of the utility costs are still their contractual responsibility up to the date of substantial completion whether or not the District is utilizing the portions or the entire facility.



Section 43 - Final PCO and Change Order (Change Order Approval)

- 43.1 Once all PCO work is complete on a project, the Architect shall prepare the final PCO to zero out the PCO log.
- 43.2 The final PCO along with a copy of the PCO log shall be routed for approval per the PCO routing process.
- 43.3 Once the final PCO is approved, the District shall prepare the Final Change Order to credit all unused allowances back to the District. Three (3) original copies of the final change order and a copy of the final PCO shall be routed as follows:
- Construction Manager
 - Assistant Superintendent
 - Superintendent



Section 44 - Final Completion

44.1 Prior to final payment, the Construction Manager shall ensure the following items are complete and verified:

- Form AQ Certificate of Final Completion is signed by the Contractor, Architect, Construction Manager, Assistant Superintendent, and the Superintendent
- AIA G704-2000 Substantial Completion Form is fully executed
- Punch list is complete and the Architect/consultants have written a letter stating the punch list is complete.

44.2 The above four (3) documents shall be routed for review and approval along with a Final Completion status cover sheet to the following people:

- Construction Manager
- Coordinator of Purchasing
- Director of Finance
- Assistant Superintendent for Business and Finance
- Superintendent

Final Payment

44.3 Once the Final Completion documents have been fully executed, final retainage payment to the Contractor and the Architect shall be released.

44.4 Final Payments that include a retainage must be signed off on by the Superintendent.

Section 45 – Project Closeout

- 45.1 In order for a project to be completely closed out, the following items must be submitted as part of the Final Project Cost Package for review and approval:
- Completed Final Project Cost Worksheet
 - Non-Fixed Asset Report from Purchasing Department
 - Executed Certificate of Final Completion
 - Board Agenda Cover Sheets
 - Notice to Proceed
 - Architect/Engineer: PO, Vendor Payment History & Contract
 - GC: PO, Vendor Payment History, Contract & Final Pay App Cover Sheet
 - GC Contract Change Orders
 - Test & Balance: PO, Vendor Payment History & Contract
 - Material Testing: PO, Vendor Payment History & Contract
 - Commissioning: PO, Vendor Payment History & Contract
 - Roof Inspection: PO, Vendor Payment History & Contract
 - Third-Party Plan Review: PO, Vendor Payment History & Contract
 - Asbestos Abatement: PO, Vendor Payment History & Contract
 - Other: PO, Vendor Payment History & Contract (MUD, Permits, Traffic Studies, etc.)
- 45.2 The items above shall be routed along with the Final Project Cost sheet and cover sheet to the following:
- Assistant Superintendent of Business and Finance
- 45.3 OAC meetings shall continue on all projects until all close out requirements are met unless an exception is granted Assistant Superintendent of Business and Finance

Section 46 – First Year Warranty

- 46.1 Once the Substantial Completion Date has been established and the Certificate of Substantial Completion document, with all attachments included, has been approved, the project shall enter the 1-year warranty phase.
- 46.2 Should the campus need to make a warranty request the Principal shall enter the request in Dude Solutions. If the item is deemed to be a warranty related issue, the work order shall be sent the District's Project Specialist.
- 46.3 The Project Specialist shall notify the architect of the warranty claim and the architect shall generate and send the contractor the official warranty request.
- 46.4 The Architect and Warranty Manager shall track all warranty requests.

6th and 11th Month Inspections

- 46.5 A complete re-inspection of the project approximately six (6) months and eleven (11) months after the established date of Substantial Completion by the Construction Manager, Project Specialist, Architect and all consultants employed by the Architect. The CM shall also inform the Principal and Director of Maintenance so they can ensure a final review and documentation of all warranty type items are turned into the Project Specialist to be submitted to the General Contractor for correction prior to the expiration of the warranty period. During these inspections, the Project Specialist will take notes and generate a standard report. A copy of this report is sent to all parties that attended the warranty walk.
- 46.6 The Project Specialist shall ensure any and all deficiencies are documented and entered into the warranty log for tracking.
- 46.7 The Project Specialist shall confirm all of the items have been transmitted to the Contractor prior to the last day of the warranty period.
- 46.8 The Project Specialist shall monitor the completion of every warranty request item until each item has been properly corrected and that the warranty log is up to date.
- 46.9 Should the contractor not respond to a warranty request or dispute a warranty request, the Project Specialist shall set up a meeting with the Construction Manager, Architect and GC to review the warranty claim.
- 46.10 All warranty items shall be inspected by the Project Specialist and/or Architect upon completion to ensure repairs are acceptable and complete.



Section 47 – Project Dedication

- 47.1 The Construction Manager shall confirm with the Chief Communications Officer whether or not a dedication ceremony will occur. Typically, this function occurs for Special Facilities that are dedicated to a selected namesake approved by the Board of Trustees.
- 47.2 The Construction Manager shall assist the dedication process at the direction of the Chief Communications Officer.
- 47.3 The Construction Manager shall ensure the following individuals are present during the date and time of the building dedication:
- Project Specialist
 - Construction Manager
 - Architect
 - Engineer
 - General Contractor
 - Other Substantially Contracted Company Representative
- 47.4 The Construction Manager shall provide a complete list of names of everyone attending from the list above to the Communications Department to coordinate with the Superintendent's speech where the parties are recognized for their contribution to the successful completion of the project.
- 47.5 The logos of each company (Architect and General Contractor) are typically required to be submitted for the development of the Dedication Program handout. The Construction Manager shall obtain such logo files so they can be submitted to the Communications Department for their use in preparing the program document.