RISBA vs MSBA

- Owner’s Project Manager
  - Requirements
  - Duties
  - Cost Savings
- Designer
- Model Schools and Kit of Parts
- Commissioning
- Maintenance
- Funding
- Timeline
- Staffing
- Appendix
State of Massachusetts has statutory requirements for OPM engagement:

- Any **public project over $1.5M** requires an OPM
- Provide **advice and consultation** with respect to:
  - Design, value engineering, scope of work, cost estimating, scheduling, etc
  - Ensures preparation of schedules which serve as control standards for **monitoring performance of project**
- **Purpose** is to add an experienced construction professional to a volunteer public building committee.

MSBA has minimal requirements for OPM qualifications.

Opportunity
Establish OPM Qualifications
**Typical OPM duties**

**OPM represents the owner during:**

- **Planning Phase:**
  - Procure Ed. Planner and other professionals
  - Track schedule and budgets
- **Design Phase:**
  - Designer procurement
  - Weekly progress meetings/minutes/agenda & special meetings as needed
  - Master schedule and budget development
- **Procurement phase:**
  - Assist in determining procurement method (GC or CM)
  - Scoping of bids once received
- **Construction Phase:**
  - Day to day oversite, data collection, progress tracking
  - Manage owner’s subs (i.e., FFE, Technology)
  - For MSBA – monthly on line updates and processing of reimbursement requests
Typical OPM duties

- **Closeout**
  - Manage punch list closeout/turnover & occupancy
  - Furniture, Fixtures and Equipment/Technology/Move Management oversite
  - Warranty information/contacts/spare parts storage

- **Control Schedule and Budget**
  - Reduce escalation costs and delays

**Opportunity**
Require OPM in Rhode Island for all projects over $1.5M.
MSBA

- Selected by MSBA Designer Selection Panel which includes 3 members from the district.
- Project Architect is required to be trained in procurement laws for public projects (MCPPO certification administered by Inspector General's Office)

RISBA

- Selected by District.

Opportunity
Provide RFP and contract templates. Possibly create State MPA for design and/or application process.
Model schools are prototype schools having the same layout and similar systems (HVAC, roofing, etc.)

Model schools easier to accomplish but face challenges when applying across the costal zone state

- For example, Urban/Suburban sites will have different requirements

**Alternative - “Kit of Parts”** – creating standards of space

- Defines: space types, sizes, adjacencies & equipment
- Allows LEA’s to select types of spaces needed to deliver their programs
- “Kit of Parts” would provide appropriate amount of space and equipment
- Saves time and money by having spaces already designed

**Opportunity**

Adopt a “Kit of Parts” protocol.
**Comissioning**

**MSBA**

- Mandated and paid 100% by MSBA.
- MSBA conducts regular procurements to pre-qualify commissioning firms that are assigned
- Contract is with MSBA.

**RISBA**

- Mandated and hired by district. Reimbursed at district’s share ratio.
- State MPA currently available.

**Opportunity**

State could pay 100% of commissioning costs similar to MSBA.
**Maintenance**

**MSBA**
- Requires documentation that demonstrates the district is actively performing routine maintenance when submitting a Statement of Interest
- Maximum incentive points for maintenance practices is 2 points
- Ranking district performance: average, below average, above average
- Scoring methodology is consistent with the goals and priorities of the statute and regulations

**RISBA**
- Requires districts to invest in maintenance
- Districts allowed to set own benchmarks and spending targets
- No ranking or scoring of districts performed

**Opportunity**
Adopt robust protocols for maintenance, incentivize proper practices & rank performance.
**MSBA**
- Dedicated funding stream - one cent of the state’s 6.25-percent sales tax.
- This dedicated Sales Tax Revenue is pledged for payment of outstanding debt service on MSBA bonds or notes.
- The MSBA may issue either general obligation or special obligation bonds, but the aggregate outstanding principal amount of bonds may not exceed $10 billion.

**RISBA**
- Annual appropriation for School Construction Aid.
- Reimbursement based - determined by existing commitments plus newly submitted projects.
- Since FY 2015, has been set at $80M.
- Difference between Housing Aid and $80M funds the Capital Fund.

**Opportunity**
Identify funding to increase SBA Capital Fund and supplement Housing Aid.
**MSBA**
- MSBA pays up to 95% of the total grant, and holds the final estimated 5% until final audit.
- The time required to closeout a contract varies dependent upon the project and the district and its team.

**RISBA**
- LEAs do not receive Housing Aid reimbursement until project is substantially complete.
- Per SCR, SBA may conduct a final audit upon project completion.
- Project schedule set by LEAs

**Opportunity**
Complete more project through pay-go (Capital Fund); and Incentivize and assist districts to complete projects more quickly to avoid escalation and cost overruns.
### MSBA

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**Reparation**
- Eligibility Period (6-9 mo)
- Initial Compliance Test
- Project Building Committee
- Educational Profile & Enrollment Process
- Maintenance & Capital Planning Exercise
- Local Authorization of Funding

**COPE Definition**
- Construction Project Team (6-8 mo)
- CPM vs. BCG
- Development program, options analysis, master budget preparation, site selection
- Enhanced Site Analysis
- Design Development
- Construction Documents
- Up to 180 days post-construction

### RISBA

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**Reparation**
- Letters of Intent (1 mo)
- Stage 1 (2 mo)
- Initial Compliance Test
- Project Building Committee
- Feasibility Analysis
- Educational Profile & Enrollment Process
- Maintenance & Capital Planning Exercise

**Stage 2**
- Local Authorization of Funding
- Design
- Financing Plan
- Feasibility Study
- Approvals
- Local Municipal Approval
- Council of Eds, Sec Ed Approval
- Vote Referendum Approval (Bonding)

**Funding the Project**
- Housing Aid (Based on project completion)
- Capital Fund (Based on project completion)
**MSBA**
- 75+ FTEs
- Consultants engaged as needed for specific projects and time periods.

**RISBA**
- 3 RIDE FTEs (supported by RIDE offices including Finance and Legal).
- RIHEBC Support including 1.3 FTEs for Admin & Financial Support and Contracted Services as needed for underwriting, legal and financial services.

**Opportunity**
Provide additional staff to support LEA’s during early stages of design and submittal process.
Appendix
- **OPM – Owners Project Manager** – provides project management guidance to an Owner throughout the life of the Owner’s Public School Project.
- **Cx – Commissioning** – Process by which equipment or a facility is tested to verify if it functions according to its design objectives or specifications.
- **MPAs – Master Price Agreements** – covers requirements for broad categories of items for a period of time.
- **RFP – Request for Proposal** – a document that solicits proposals, through a bidding process, for procurement of a service.
- **RFQ – Request for Qualifications** – a document submitted to potential suppliers eliciting quotations for a product or service.
- **GC – General Contractor** – is responsible for the overall coordination of a project.
- **CM – Construction Manager** – oversees the planning, design, and construction of a project. Purpose is to control a project’s time, cost, and quality.
Definitions

- **SCR – School Construction Regulations** – govern the process by which the RI Board of Regents for Elementary and Secondary Education perform their statutory function of determining the necessity of school construction, establishing standards for design and construction of school buildings, approving projects for school housing aid reimbursement, and ensuring that districts have adequate asset protection plans to maintain their school facilities.

- **LEA – Local Education Agency** - a public board of education or other public authority legally constituted within the State for either administrative control or direction of, or to perform a service function for, public elementary or secondary schools.

- **FTE – Full Time Employee** – an employee employed on average at least 30 hours per week, or 130 hours per month.

- **SOI – Statement of Interest** – allows districts to inform MSBA about deficiencies that may exist in a local school facility and how those deficiencies inhibit the delivery of the districts educational program.