

Timeline Narrative of the Management of the CMSD Construction Program

The following is a summary of how CMSD managed the construction process to stay on top of the issues and concerns that come up with construction during the Capital Improvement Program.

The Early Years

During the first four years of the Program, the District relied on its internal staff, the Ohio School Facilities Commission (OSFC), project architect, construction manager and retained a consortium led by Heery International that included VAA and Stephens as an Owner's Representative to stay on top of construction issues.

The internal staff working on the Capital Improvement Project consisted of ten CMSD employees: two high level Managers (Paul Flescher and Nick Jackson), a manager of community engagement (Helen Piffard), a manager of the architect design process (Hollie Dellisanti), a manager of the engineering process (Bestman Elee), two contract managers (Marion Shields and Dennis Wiania), a planner (Dennis Donohue), and two administrative assistants and support from internal technology, legal and finance divisions. District employees would be deployed to address issues arising during construction and support the Owner's Representative, Construction Manager and Architect. Additionally, the District would rely on its internal expertise in its Building Trades Department for specialized input. Primary responsibility for resolving construction issues (think: "How to do something?") would rest with the Construction Manager, Architect and the contractor involved. However, when an issue arose that required the balancing of costs of construction vs. operations of the school the appropriate District individual would be involved with responsibility resting with Paul Flescher.

Until 2012, the District hired the architect with OSFC approval and the OSFC hired the Construction Manager. The District, concerned that the project would face administrative delays, retained an Owner's Representative to facilitate various elements of the project. During the second half of 2006, the District rethought its deployment of resources and began to realign and streamline its approach. Heery's contract covered many services that were also addressed in the architect and construction manager's contracts and costs. The District determined that there was considerable overlap between Heery's scope of services and the project architect and construction manager and was concerned with the cost of that overlap. Heery's costs were over \$6.5 million from 2003 through 2006.

Heery's contract was not renewed. The District relied upon the Construction Manager and Architect and intentionally raised the compensation of the Architect to cover the additional reliance. Architect compensation rose, over time, from 4.5% to 6.5% (at the time the OSFC recommended rate).

2007-2012

Beginning in August, 2006, Gary Sautter took over the management of the project. Nick Jackson's role was focused on Community, City and Utility coordination. The positions of community engagement and one of the contract managers and an administrative position were eliminated and consolidated into other positions. Fred Rodgers took over the lead on behalf of the OHGR Team (Regency Construction was part of the consortium).

Beginning in 2007, the District, with the OSFC support, engaged in a retro-commissioning project to ensure that the HVAC systems were correctly installed during segments 1 and 2. The OSFC had added commissioning as part of its project delivery model and was willing to co-fund such services in early segments. The commissioning followed OSFC's best practices and focused on the HVAC systems and building envelope.

Executive meetings were held monthly and focused on a summary of project status and trouble shooting construction issues. If an issue was incapable of being resolved at the monthly meeting, an individual was tasked with the next action and instructed to keep those who need to be involved in the loop through phone calls or group emails as appropriate. If the issue was of significant magnitude due to its impact on the project, follow-up conference calls or meetings were scheduled on that issue.

2012- Today

In 2012, CMSD became one of the first OFCC (the new acronym when the OSFC became the Ohio Facilities Construction Commission) co-funded school district to embrace Construction Management at Risk (CMR) for the John Marshall, Cleveland School of the Arts and Max Hayes projects. The embrace of CMR also led to the re-creation of the Owner's Representative role. OHG fills the Owner's Representative role and serves as a liaison among all school construction projects, coordinates OFCC paperwork and record keeping and a double check on the quality of construction. The current CMSD staff dedicated to capital improvements includes Gary Sautter and Hollie Dellisanti and one administrative person. They are supplemented by Finance, the Operations Division and outside consultants.

Quality construction begins with the design professionals. The OFCC and District work collaboratively on the retention of design professionals. The District and OFCC have required the disclosure and approval of engineering consultants. CMSD has continued to allow for a reasonable design timeline. The use of the Guaranteed Maximum Price (GMP) Amendment has also led to document refinement. A review of the GMP's Exhibit A (Assumptions and Clarifications) has allowed all on the project team to weed out ambiguity or seek refinement of the documents. The GMP process also addresses subcontracting as such issues can plague a project. One of the primary reasons for moving toward CMR was assuring quality of construction as there is greater control of subcontractors. The quest to avoid construction issues begins with assembling the best team.

At the Schematic Design, Design Development and Contract Documents stages of design, the documents are reviewed by the CMR, Owner's Representative, Commissioning Agent, the OFCC and often the City of Cleveland and other entities having jurisdiction over the project for compliance with the Ohio Design Manual, local building codes and other applicable requirements. The retention of the CMR early in the process allows the documents to be reviewed and molded prior to finalization. Comments from all entities are incorporated into the successive set of documents. During the bidding process, the CMR engages in scope of work reviews that are attended by OHG and Architect (Engineers are often involved as well) that further refine any issues with the documents.

Many of the most confounding issues on construction projects relate to soil issues and the appropriate solution to a challenge. Prior to Segment 7, the District hired the construction testing agent separately. Beginning in Segment 7, the testing agent has been under the architect to allow for better resolution of construction issues. The testing agent communicates directly with the Architect, CMR and OHG regarding issues and solutions when they arise. CMSD is involved as solutions often require funding and the balancing of approaches.

During construction, OHG attends the onsite meetings conducted by the superintendent and project managers. The Architect is required to be on site for 16 hours per week. OHG and the architect walk the site frequently. CMSD is often at those walks. OHG actively reviews schedules and provides comments directly to the CMR. Schedules are discussed at the Executive Meeting and OHG is often given direction to approve the use of CMR contingency to react to potential acceleration when weather windows open.

The construction issues surrounding Covid 19 provide an example of the process. Issues were raised by all parties regarding how to appropriately react to Covid. The issues were raised and discussed at an Executive Meeting. Due to governmental and other directives, the facts changed and a monthly meeting was no longer going to work. For the ongoing projects we moved to weekly executive meetings which were often supplemented with daily conference calls and group emails working through how the two high school projects would be managed. Often the CMR and OHG would be tasked with generating recommendations for the Owners to consider. Issues discussed related to worker safety, social distancing and stream of commerce issues. Work that required multiple people to be in a small area was identified and strategies were developed. Ultimately all projects are still slated to open this year as scheduled.

The District usually assigns the Custodian to the new project a month or two before opening to allow for the learning of the building and address operational issues. That individual works directly with OHG during the first year to identify items that may not have been addressed on various punch lists or are not performing up to expectations.

Conclusion:

This is a timeline and history of how the construction program has been managed. Let me know if you have any questions.