



Facilities & Construction Procedures Manual



May 2015

Revised 3/31/20

FACILITIES & CONSTRUCTION PROCEDURES MANUAL

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Introduction

The Leon County School District is proud of not only the outstanding academic achievements of its students, but also its accomplishments in planning, designing and constructing educational facilities that enhance learning opportunities for those students. The LCS Facilities & Construction Department is committed to following best practice standards and the most responsible use of taxpayer resources to provide a safe, economical and effective learning environment for students, faculty and staff.

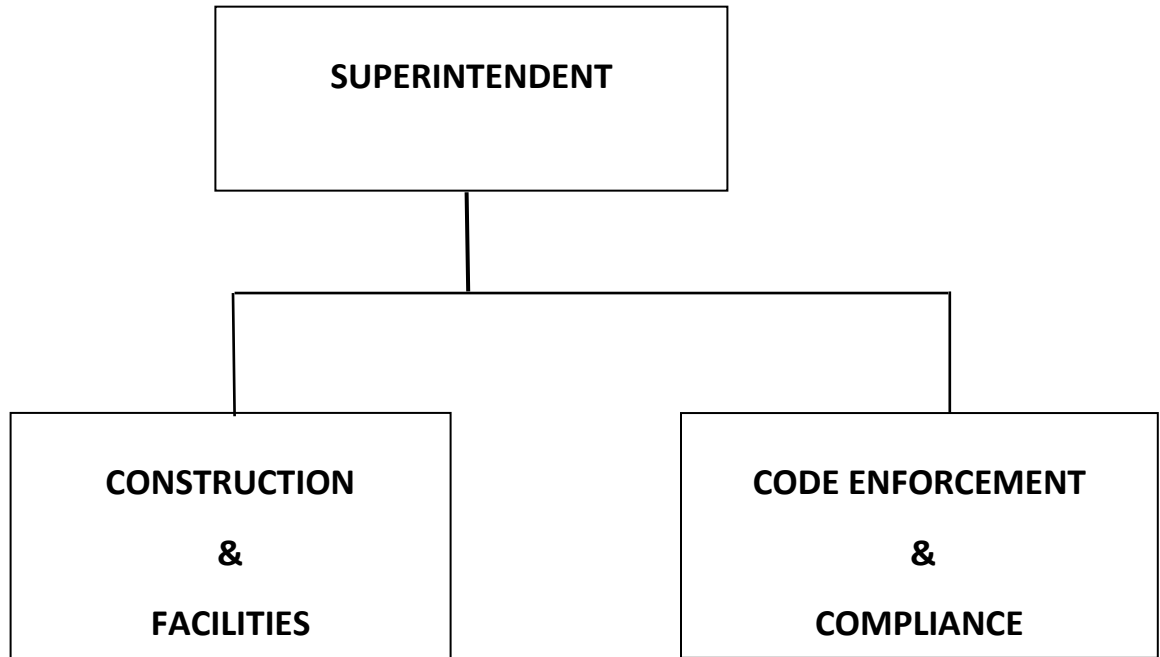
With 34,000 students, 4,200 faculty and staff, and 5.5 million square feet in facilities, the Leon County School Board has far-reaching responsibility. The job of providing the needed facilities is both extensive and complex. Board members have the responsibility of providing those facilities while meeting established criteria for efficiency, economy and safety. The citizens and taxpayers of Leon County have a vested interest – and the District makes a concerted effort to clearly and fully explain how the process works.

This manual has been developed to provide an overview of Facilities & Construction standard operating procedures -- explaining staff organization and responsibilities, planning for short- and long-range needs, management of construction processes and associated costs, adherence to government regulation, and guidance from established “best practices” for effectiveness and efficiency. The District recognizes the public’s keen interest in these activities. Accordingly, it is committed to full public transparency in all aspects of the facilities planning and construction process.

Transparency is achieved in a number of different ways. Citizens are welcome to attend meetings of the District School Board, providing them a forum for asking questions and sharing their views. Board meetings also are televised on the LCS cable TV channel. The District maintains a very comprehensive website that provides information on a wide range of topics, including detailed information on facilities planning and construction activities. Other significant sources of information include the news media and face-to-face communication through such organizations as school PTOs and the LCS District Advisory Council.

The District is committed to transparency in carrying out all major steps in the construction process. For example, the LCS website outlines specific procedures followed for District construction projects and provides periodic status reports on individual projects. Construction projects are advertised in the *Tallahassee Democrat* so interested businesses (architects, engineers and contractors) can submit bids. The District website provides notice of open meetings for the selection of the professional vendors who handle specific building projects. Records of every aspect of construction work are maintained in District files that are open to the public.

It is expected that this manual will be revised and refined on an ongoing basis in a continuing effort to improve the District's Facilities & Construction operation. The existence and objectives of the manual will be referenced and hyperlinked in a School Board policy. This policy will describe the main components of the manual, and Board members will be asked to periodically review and approve a summary of additions, deletions and other changes.



- **Educational Facilities Plan**
- **Long-Range Planning**
- **FISH**
- **Plant Survey**
- **Real Estate**
- **Capacity Tracking**
- **Level of Service**
- **Concurrency**
- **Intergovernmental Liaison**
 - **DEP**
 - **COT**
 - **Leon County**
 - **WMD**
 - **Utilities**

- **Contractor Pre-qualification**
- **Contracting**
- **Design Management**
- **New Construction**
- **School Initiated Projects**
- **Major Renovation & Remodeling**
- **Estimating**
- **Project Management**
- **Cost of Construction**
- **Accounting**
- **Plan Room**

- **Plan Review**
- **Permitting**
- **Construction Inspections**
- **SREF Inspections**
- **Fire Safety Inspections**
- **ADA Compliance**
- **Environmental Health & Safety**
 - **Indoor Air Quality**
 - **Water Quality**
 - **Custodial Services/Training**
- **Nutrition/Food Svc Compliance**
- **Transportation Compliance**
- **Small Business Enterprises**

Facility Planning

Long-Range Planning

- District Master Planning
 - School Attendance Boundaries
 - Acquisition & Disposal of Facilities & Property
- Campus Master Planning
 - Use of Facility
 - Grade Structure
 - Area Demographics

Facility Planning

- Needs Assessment
 - Existing Facilities
 - Enrollment
 - LOS Standards
 - Capacity – Student Stations & Core
 - Condition & Life Cycle
 - Program Changes
 - Intergovernmental Coordination
- Prioritization
 - Capital Outlay Committee

Education Plant Survey

- F.S. 1013.31 | SREF 3.1
 - Conducted at least every five years.
 - New survey due this summer.
 - Completed and managed in the FDOE Educational Facility Information System (EFIS).
-
- Uses District FISH (Florida Inventory of School Houses) data compared to the student population projections and District facility lists to generate recommendation for remodeling, renovation, new construction, site acquisition, site development and site improvement for new educational and ancillary plants and auxiliary facilities.

Education Facilities Plan (EFP)

Requirements

1. Projected student populations
2. Inventory of existing school facilities
3. Projections of facilities space needs
4. Information on leased, loaned and donated space and relocatables
5. General location of schools proposed over 5-10-20 year time periods
6. Options for reducing the need for additional permanent student stations
7. Criteria and method for determining the impact of proposed development

EFP must also include a financially feasible District Facilities Five-Year Work Program.

Planning, Programming, Budgeting & Execution Process (PPBE)

<i>Process</i>	<i>Time Frame</i>	<i>Year(s)</i>	<i>Action</i>
Planning	1-5 years	2015/16 - 2019/20	Needs Assessment
Programming	1-2 years	2015/16 - 2016/17	Needs Prioritization Scope of Work (SOW) Estimates Schedules
Budgeting	1 year	2015/16	Develop Budget Educational Facilities Plan
Execution	1 year	2015/16	Construction

Contract Award Process

Contractor Prequalification – In accordance with LCS Policy 6334, SREF 4.1(1) and F.S. 1013.46(2)

All contractors seeking to obtain a prime contract with the district

Hard Bid (*also known as Design-Bid-Build*) –

Project is advertised.

Prequalified contractors submit bids.

Bid Opening – Lowest, most responsive, qualified bidder meeting specification is recommended to the Board for contract award.

Construction Manager – Continuing Service Contracts estimated not to exceed \$1,500,000 (LCS will limit the use of this method to contracts estimated at no more than \$200,000.)

Request for Qualifications is advertised.

Prequalified CM firms submit response.

Short-List Committee reviews all responses and ranks firms.

Selection Committee interviews no fewer than the top five short-list firms and recommends no fewer than three nor more than 10 firms in order of preference to the Board for contract award.

Construction Manager – Projects estimated to cost over \$1,500,000

Request for Qualifications is advertised.

Prequalified CM firms submit response.

Short-List Committee reviews all responses and ranks firms.

Selection Committee interviews no fewer than the top five short-list firms and recommends three firms in order of preference to the Board for contract award.

Contractor (Elec., Mech., Roofing, Plumbing, etc.) – Continuing Services Contracts

Invitation to Bid is advertised for electrical work. All others are posted on the District website.

Prequalified contractors respond.

Bids are opened and the lowest, most responsive qualified bidder meeting specification is recommended to the Board for contract award. (May award more than one.)

Contractor (Elec., Mech., Roofing, Plumbing, etc.) – Stand-alone project

Project is advertised.

Prequalified contractors submit bids.

Bid opening – Lowest, most responsive, qualified bidder meeting specification is recommended to the Board for contract award.

Architect/Engineer - Continuing Service Contract

Request for Qualifications is advertised.

Short-List Committee reviews all responses and ranks firms.

Selection Committee interviews no fewer than the top five short-list firms and recommends no fewer than three nor more than 10 firms in order of preference to the Board for contract award.

Architect/Engineer – Major Project

Request for Qualifications is advertised.

Short-List Committee reviews all responses and ranks firms.

Selection Committee interviews no fewer than the top five short-list firms and recommends three firms in order of preference to the Board for contract award.

Selection of Subcontractor

In projects requiring the use of a subcontractor, the Leon County School Board is responsible for appropriately monitoring and documenting subcontractor bid awards in order to ensure that subcontractor services are obtained at the lowest cost consistent with acceptable quality and that the District realizes maximum cost savings under the GMP contracts. In order to accomplish this, the Project Coordinator will be present at all subcontractor bid openings and will maintain in the official LCS project file a copy of each subcontractor bid proposal.

Prequalification of Contractors for Educational Facilities Construction

Leon County School Board Policy 6334 details the criteria, procedures and application process for the prequalification of contractors. Below is a summary of the requirements. Contractors must be prequalified in order to respond to an Invitation to Bid (ITB), Request for Qualifications (RFQ) or a Request for Proposal (RFP).

To prequalify, a contractor must submit one copy of each of the following items to the LCS Facilities and Construction Department:

1. A Copy of any and all state licenses held.
2. Bonding
 - a) For work over \$200,000.00, a letter from the contractor's Surety Company showing the name of the company who will provide bonding and the amount, single and aggregate, they will provide bonding for (See LCS Board Policy 6334 for bonding amounts and ratings.)
 - b) For work under \$200,000.00, a signed letter on company letterhead indicating that the company will not be performing work in excess of that amount.
3. A company profile, (you may use the AIA 305A document or any similar format). Please include a contact name, email address and phone number.
4. A completed signed and notarized Sworn Statement of Public Entity Crimes. Please remember to mark your selection on item number 6. This form is available on our webpage; www.leonschools.net/Page/4815 under resources.
5. A list of projects the contractor has completed during the past five (5) years. If the list is extremely long, an abbreviated list of representative projects may be submitted.
6. Litigation or claims against your company:
 - a) A statement identifying any litigation or claims your company in the past five years.
 - b) If there has been nolitigation or claims against your company in the past five years you must provide a statement indicating that.
7. Current Insurance Certificate(s) indicating contractor's liability, automobile and worker's compensation coverage. (See School Board Policy 6334 for limits.)
8. Signed and notarized statement declaring that everything submitted is true and correct.

The Prequalification Certificate will be sent to the contractor and will be valid for a period of one year from date of approval by the Board. To renew prequalification, a contractor must update and resubmit all of the above required information.

Architect/Engineer & Construction Manager Selection

Advertisement

Requests for Qualifications for Professional Services will be advertised in the *Tallahassee Democrat* and in the Facilities & Construction section of the Leon County Schools website for three consecutive weeks prior to the commencement of the selection procedure.

Selection Committees

The District will use a two-committee process managed and supported by the Facilities & Construction Contract Administrator.

- The Short-List Committee will be composed of district staff from:
 - Facilities & Construction;
 - Maintenance;
 - District Staff as designated.

The Short-List Committee will review and rank all RFQ responses.

- The Interview Committee will be composed of district staff from:
 - Facilities & Construction;
 - Maintenance;
 - District Staff as designated;
 - LCS Small Business Office;
 - Public member appointed by Board.

(Interviews are open to the public with the exception of firms participating in the interviews and are noticed on the Facilities & Construction Contracting webpage <https://www.leonschools.net/Page/4233>.)

Stand-Alone Contracts – Cost Estimated to Exceed \$1.5 million

The Interview Committee will receive presentations from the top five-ranked firms for stand-alone projects estimated cost to exceed \$1,500,000. Upon completion of the rankings by the Interview Committee, the Director of Construction will negotiate the contract fee with the top-ranked firm. The results of the Interview Committee rankings will be submitted to the School Board with a recommendation for contract award to the top-ranked firm at the negotiated amount, as well as the estimated project dollar amount developed by the Facilities & Construction Department.

Continuing Service Contracts – Cost Estimated Not to Exceed \$1.5 million

The Interview Committee will receive presentations from the top five-ranked firms. The results of the Interview Committee rankings will be submitted to the School Board with a recommendation for contract award to one or more firms. The number of firms recommended for continuing service contracts will be based on the anticipated workload within the contract period as estimated by the Director of Construction. Since the District's general intent is to select more than one firm, work will be assigned among the selected firms by utilizing a rotational methodology. The final rankings approved by the School Board will be based on scores assigned during the interview phase of the selection process. The firm ranked number one (highest score) will be offered the first project. The remaining selected firms will be offered subsequent projects according to their final rankings. If a firm does not accept an offered project, that still will be counted as a project for the purpose of offering the firm future projects, and the firm will rotate to the bottom of the list. The assignment of work will be contingent upon acceptable fee negotiation.

In the event of a tie score by the Short-List or the Interview Committee, the Contract Administrator will use the following criteria to determine the order of award/ranking.

- a) None or all responses certify a drug-free workplace has been implemented
- b) None or all Local Vendor as specified in School Board Policy 6450
- c) None or all Small Business Enterprise certified as specified in School Board Policy 6325
- d) Subsections (1), (2), and (3) failed to resolve the identical evaluations, the agency shall determine the award/ranking by a means of random selection (e.g., a coin toss or drawing of numbers).

Documentation

A file will be maintained for all selections. The file will contain:

- RFQ advertisement;
- All RFQ responses;
- Short-List and Interview Committee member names;
- Short-List and Interview Committee meeting dates;
- Short-List and Interview Committee score sheets.

Review

The District review will be conducted by:

- District staff;
- School Board attorney.

Approval

The selection of architects/engineers and construction managers will be approved by the Leon County School Board.

Project Delivery Methods

No single project delivery method is appropriate for every project. Each project must be analyzed individually to determine how it best aligns with the attributes of each available delivery method. Below is a brief description of the three most common delivery methods:

Design-Bid-Build (DBB): The traditional project method (also known as “hard bid”) that involves three sequential phases

Bottom Line:

The competitive bid or Design-Bid-Build delivery method is a good choice for simpler projects that are budget- (but not schedule-) sensitive and unlikely to change.

Construction Management at Risk (CM@R): A project delivery method in which the Construction Manager acts as a consultant to the Owner during the design phase, but assumes the risk for construction performance as the equivalent of a General Contractor, holding all trade subcontracts during the construction phase

Bottom Line:

The Construction Manager at Risk delivery method is best suited for large projects -- both new and renovation -- that are difficult to define, likely to change in scope, or schedule-sensitive. It’s also useful in projects requiring extensive management, whether due to technical complexity, multi-trade coordination, or multiple phases.

Design-Build (DB): A project delivery method that combines Architectural and Engineering design services with construction performance under one contract

Bottom Line:

The Design-Build delivery method is most useful in time-sensitive projects having either small user groups or a reduced need for user reviews, and it particularly excels in projects with specialized or technically complex scopes.

Facilities & Construction will conduct an analysis of each project to determine the most appropriate project delivery method prior to the selection of the design professionals. The Project Delivery Method Recommendation Form will be used to document the most suitable delivery method.

Project Delivery Method Analysis

Schedule – Is overlap of design and construction phases necessary to meet schedule requirements?

Scope of Work – Is the scope of work difficult to define?

Unique Project? – Does the District have recent experience with this type of work?

Owner Staffing – Are qualified personnel available for Project Management?

Cost – Is cost a prime consideration?

PROJECT DELIVERY METHOD RECOMMENDATION LEON COUNTY SCHOOLS

PROJECT NAME:

Please complete the following questions:

		CHECK BOX BELOW	
1. Is overlap of design and construction necessary to meet schedule requirements?		YES - Consider CM	
Comments:		NO - BID	

2. Is the scope of work well defined?		YES - BID	
Comments:		NO - Consider CM	

3. Is this a unique project? Does the district have experience with this type of construction/project?		YES - BID	
Comments:		NO - Consider CM	

4. Staffing - Does the district have adequate staffing to provide Construction Management for this project?		YES - BID	
Comments:		NO - Consider CM	

5. Is cost a prime consideration?		YES - BID	
Comments:		NO - Consider CM	

DELIVERY METHOD RECOMMENDATION:	
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Payment Applications

Pay applications are prepared on AIA Document G702 – 1992.

Subcontractors submit documentation to the contractor for payment of completed work.

The contractor verifies the percentage of project completion and submits documentation for completed work based on the subcontractor's contract.

The contractor prepares three copies of form AIA G702 for payment of completed work. A schedule of values is attached, breaking down the contract into the project divisions (site, electrical, mechanical, plumbing, concrete, millwork, etc.). The schedule of values is based on the percentage of completed work and attached subcontractors' pay request documentation. Documentation must be provided for all billed costs. The documentation shall be organized by cost code matching all line items on the Schedule of Values. A detailed job cost report shall be included. The contractor certifies that to the best of his/her knowledge the work covered in this pay application has been completed in accordance with the construction documents. The payment form is dated and the contractor's signature is notarized. The form is then submitted to the architect of record for review.

The architect of record reviews the contractor's pay request and certifies the amount that the contractor has completed and for which he/she is entitled to payment. The architect submits the three copies of the pay application to the LCS Facilities & Construction Department.

The pay applications are date-stamped when received and delivered to the LCS Accounting Department. Accounting reconciles the pay application based on the Board approved contract amount, the billed amount and the included documentation. After reviewing, Accounting stamps the pay application for the Project Coordinator's review and signature.

The Project Coordinator reviews the pay application based on the percentage of completed work and the schedule of values. The Project Coordinator reviews the schedules and back-up for accuracy based on the Board-approved contract. Based on his/her approval of the pay application, the Project Coordinator signs and dates the pay application. If the Project Coordinator rejects the pay application, the contractor and architect are so notified. The pay application is returned with an explanation of the reason for rejection. The contractor submits a new pay application for review. After the Project Coordinator has signed and dated the new pay application, it is given to the Director of Construction for review.

The Director of Construction reviews, signs, dates and submits the pay application back to Accounting for payment.

✓ Paid 11/07/14 CK# 752562

11/6
Project Coordinator Date 11/4/14
Director Date 11/6/14



Application and Certificate for Payment

TO OWNER: Leon County Schools
3420 West Tharpe Street
Tallahassee, FL 32303
PROJECT: Bus Miami Building (Foundation & Lift Equipment)
APPLICATION NO: 5
PERIOD TO: October 23, 2014
CONTRACT FOR: General Construction
CONTRACT DATE: November 17, 2009
PROJECT NOS: 10 / 12 / 960
DISTRIBUTION TO:
OWNER: X
ARCHITECT: X
CONTRACTOR: X
FIELD:
LCSP02811400223

FROM: RAM Construction & Development
20 RAM Blvd.
FL 32343
MIDWAY, ARCHITECT:
2884 Pablo Avenue
Tallahassee, FL 32308
LEON COUNTY SCHOOLS
2810 S. GOLF COURSE RD.
TALLAHASSEE, FL 32309
CONSULTING GROUP

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment, as shown below, in connection with the Contract. Continuation Sheet, AIA Document G703, is attached.

- 1. ORIGINAL CONTRACT SUM \$ 635,231.19
- 2. NET CHANGE BY CHANGE ORDERS \$ 235,272.33
- 3. CONTRACT SUM TO DATE (Line 1 ± 2) \$ 870,503.52
- 4. TOTAL COMPLETED & STORED TO DATE (Column G on G703) \$ 843,518.00
- 5. RETAINAGE:
 - a. 10 % of Completed Work (Column D + E on G703) \$ 84,351.80
 - b. 0 % of Stored Material (Column F on G703) \$ 0.00
 - Total Retainage (Lines 5a + 5b or Total in Column I of G703) \$ 84,351.80
- 6. TOTAL EARNED LESS RETAINAGE \$ 759,166.20 (Line 4 Less Line 5 Total)
- 7. LESS PREVIOUS CERTIFICATES FOR PAYMENT \$ 723,992.22 (Line 6 from prior Certificate)
- 8. CURRENT PAYMENT DUE \$ 35,173.98
- 9. BALANCE TO FINISH, INCLUDING RETAINAGE (Line 3 less Line 6) \$ 111,337.32

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.

CONTRACTOR: Robert H. Amin Date: 10/23/14
By: State of Florida



County of: Leon
Subscribed and sworn to before me this 23rd day of October, 2014
Notary Public: Paul A. Gleasman
My Commission expires: March 25, 2015

ARCHITECT'S CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on on-site observations and the data comprising this application, the Architect certifies to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \$ 35,173.98
(Attach explanation of amount certified differs from the amount applied. Initial all figures on this Application and on the Continuation Sheet that are changed to conform with the amount certified.)

ARCHITECT: Douglas (Douglas) Cooper Date: 10/27/14
By:

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

CHANGE ORDER SUMMARY	ADDITIONS	DEDUCTIONS
Total changes approved in previous months by Owner	\$ 235,272.33	\$ 0.00
Total approved this Month	\$ 0.00	\$ 0.00
TOTALS	\$ 235,272.33	\$ 0.00
NET CHANGES by Change Order	\$	235,272.33

POSTED

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INVOICE # 2811400223-5 CIV.
PO # 2811400223
INV. DATE 10/23/14
FUND FUND OBJ CONTR PROJ PRGN
2021 7410 1.00 9/01 33600

Architect/Engineer Post-Project Evaluation

OVERVIEW

Architects and Engineers (A/Es) are rated no later than 90 days after project Final Completion.

The Project Coordinator reviews each firm's performance and assigns points for each category using the following scale:

4 = Outstanding *2 = Satisfactory (meets expectations)*
3 = Above Satisfactory *1 = Less than Satisfactory*

A satisfactory score of “2” is the benchmark rating and the level of performance that meets contract requirements.

RATING CRITERIA

1. **Quality of Technical Services**

Evaluates firm's ability to deliver technical services with minimum problems. Such problems may include mistakes in design or analysis, lack of thoroughness, lack of familiarity with codes, ignorance of contract document requirements and, in general, deficiencies resulting from the lack or misapplication of technical and administrative skills, and/or project-specific knowledge that the firm is expected to have or obtain.

2. **Timeliness of Service**

Evaluates firm's ability to set realistic schedules for the delivery of its services and the firm's effectiveness in meeting approved schedules.

3. **Quality of Technical Documentation**

Evaluates clarity, accuracy and general detail of technical documentation produced by the firm, including reports, drawings, specifications, sketches, renderings, promotional materials and various other documented forms intended to communicate information about projects to owners or others.

4. **Cooperation/Concern for LCS Interests**

Evaluates the degree to which the firm cooperated with the owner and the extent of the firm's commitment to the protection and advancement of the interests of LCS.

5. Administration of Project Paperwork

Evaluates the accuracy, timeliness of submission and thoroughness of paperwork associated with the administration of the project. Such paperwork includes pay requests, additional services requests, status reports, change orders and shop drawing review, meeting minutes and Request for Information (RFI) responses.

6. Accuracy of Estimates

Evaluates the accuracy of the estimates at each phase of design in relation to the actual construction cost and the LCS stated budget.

SIGNATURES

The Project Coordinator finalizes the form, signs the form and secures the approval and signature of the Director of Construction.

TRANSMITTAL OF RATING TO FIRM

The Project Coordinator sends a copy of the evaluation to the rated firm by email.

APPEAL OF RATINGS

If an Architect/Engineer appeals its rating within the required time, the Project Coordinator will discuss the rating with the firm and attempt to resolve the differences informally. If informal discussions do not result in a resolution, the Project Coordinator will notify the firm in writing of the time and place to appear before a review committee. This notification shall be sent certified mail, return receipt requested.

The review committee shall consist of: the LCS Project Coordinator, the Director of Construction and the Chief of Facilities and Construction.

The review committee will discuss the rating and related issues with the appealing firm to hear the basis for the appeal. After reviewing the circumstances surrounding the rating and appeal, the review committee makes a finding. The District notifies the firm of the review committee's finding and sets forth specifically the basis of the finding. The firm will be notified that the finding of the review committee is final unless a formal hearing before the School Board is requested within 14 days. The notification is sent certified mail, return receipt requested.

MAINTENANCE OF RATING DATA BASE

The LCS Facilities and Construction Contract Administrator will maintain a database of ratings. Ratings will be kept on current file for three years.

FORMS

Architect/Engineer Post-Project Evaluation Form

ARCHITECT/ENGINEER POST-PROJECT EVALUATION FORM - Leon County Schools

DATE:	A/E NAME:
PROJECT COORDINATOR NAME:	PROJECT:
	DESCRIPTION:

Assign a project performance rating (based on scale below) for each of the following criteria and include an explanation supporting the assigned rating.

4 = Outstanding 3 = Above Satisfactory 2 = Satisfactory (meets expectations) 1 = Less than Satisfactory

1. Quality of Technical Services:	RATING	
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2. Timeliness of Service:	RATING	
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3. Quality of Technical Documentation:	RATING	
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4. Cooperation/Concern for LCS Interests:		
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5. Administration of Project Paperwork:	RATING	
--	---------------	--

6. Accuracy of Estimates:	RATING	
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Additional Comments:		TOTAL
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SIGNATURES:	DATES:
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PROJECT COORDINATOR:	
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DIRECTOR OF CONSTRUCTION:	
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Contractor Post-Project Evaluation

OVERVIEW

Contractors under contract to LCS are evaluated no later than 90 days after project Final Completion.

The Project Coordinator reviews each firm's performance and assigns points for each category, using the following scale:

4 = Outstanding *2 = Satisfactory (meets expectations)*
3 = Above Satisfactory *1 = Less than Satisfactory*

A satisfactory score of “2” is the benchmark rating and the level of performance that meets contract requirements.

RATING CRITERIA

1. Quality of Service

Evaluates firm's ability to deliver services with a minimum of problems. Such problems may include mistakes in estimates or analysis, lack of thoroughness, lack of familiarity with codes, ignorance of contract document requirements and, in general, deficiencies resulting from the lack or misapplication of skills and/or project-specific knowledge that the firm is expected to have or obtain.

2. Quality and Timeliness of Reports and Records

Evaluates firm's ability to meet approved schedules for provision of design review reports, monthly construction reports, meeting minutes, submittals of shop drawings, project schedules, etc.

3. Cooperation/Concern for LCS Interests

Evaluates the degree to which the firm cooperated with the owner and the extent of the firm's commitment to the protection and advancement of the interests of LCS.

4. Administration of Project Paperwork

Evaluates the accuracy, timeliness of submission and thoroughness of paperwork associated with the administration of the project. Such paperwork includes pay requests, contingency authorization forms, change orders, change order proposals and requests for information.

5. Value Engineering Effectiveness

Evaluates firm's ability to analyze the design documents and recommend creative approaches to make construction more efficient and reduce costs.

6. Ability to Work with Design Team

Evaluates firm's ability to work as part of a team with the architect/engineer, to provide constructive reviews and be available to assist the architect/engineer during the design development.

7. Cost Estimating Effectiveness

Evaluates firm's ability to provide accurate cost estimates and suggest alternative approaches.

8. Coordinating and Scheduling of Work

Evaluates firm's ability to schedule work and coordinate trade contractors and suppliers to maintain the overall project schedule. Also evaluates firm's efforts in involving minority business enterprises in the project.

9. Workmanship/Product Quality Assurance

Evaluates firm's ability to provide quality construction in accordance with the plans and specifications. Does the firm insist on quality workmanship from the trade contractors and require the removal of non-complying work? Does the firm maintain a clean site? Does the firm comply with storm water runoff requirements?

10. Management of Contingency Funds

Evaluates firm's ability to manage its contingency, spending only funds authorized by LCS. Are funds spent on corrections or other costs that should have been avoided?

11. Adequacy of As-Built Information

How well did the firm maintain as-built information on a marked-up set of prints so that it could easily be translated to record drawings at the end of the project?

12. Preparation of Close-out Documents

How complete and timely were the provision of close-out documents? (as-built information, releases of lien, warranty information, operating manuals, etc.)

13. Timely Accomplishment of Punch List

Was the punch list completed within the time allowed by contract?

14. Warranty Services

Responsiveness to Service Requests -- Documents the firm's willingness and responsiveness to requests for service during the warranty period.

SIGNATURES

The Project Coordinator finalizes the form, signs the form and secures the approval and signature of the Director of Construction.

TRANSMITTAL OF RATING TO FIRM

The Project Coordinator sends a copy of the evaluation to the rated firm by email.

APPEAL OF RATINGS

If a contractor appeals its rating within the required time, the rating committee will discuss the rating with the firm and attempt to resolve the differences informally. If informal discussions do not result in a resolution, the Project Coordinator will notify the firm in writing of the time and place to appear before a review committee. This notification shall be sent certified mail, return receipt requested.

The review committee shall consist of: the LCS Project Coordinator, the Director of Construction and the Chief of Facilities and Construction.

The review committee discusses the rating and related issues and meets with the firm making the appeal to hear the basis for the appeal. After reviewing the circumstances surrounding the rating and appeal, the review committee makes a finding.

LCS notifies the firm of the review committee's finding and sets forth specifically the basis of the finding. The firm will be notified that the finding of the review committee is final unless a formal hearing is requested within 14 days. The notification is sent certified mail, return receipt requested.

REQUEST FOR HEARING

If the firm requests a hearing, the matter is referred to the Department of Administrative Hearings to handle as prescribed in Chapter 120, F.S. If the firm does not request a hearing, the finding of the review committee is final.

MAINTENANCE OF RATING DATA BASE

The LCS Facilities and Construction Contract Administrator will maintain a database of ratings. Ratings will be kept on current file for three years.

FORMS

Contractor Post-Projection Evaluation Form

CONTRACTOR POST-PROJECT EVALUATION FORM - Leon County Schools

DATE:	CONTRACTOR NAME:
PROJECT COORDINATOR NAME:	PROJECT:
	DESCRIPTION:

Assign a project performance rating (based on scale below) for each of the following criteria and include an explanation supporting the assigned rating.

4 = Outstanding 3 = Above Satisfactory 2 = Satisfactory (meets expectations) 1 = Less than Satisfactory

1. Quality of Service:	RATING	
2. Quality and Timeliness of Reports and Records:	RATING	
3. Cooperation/Concern for LCS Interests:	RATING	
4. Administration of Project Paperwork:	RATING	
5. Value Engineering Effectiveness:	RATING	
6. Ability to Work with Design Team:	RATING	

7. Cost Estimating Effectiveness:	RATING	
8. Coordinating and Scheduling of the Work:	RATING	
9. Workmanship/Product Quality Assurance:	RATING	
10. Management of Contingency Funds:	RATING	
11. Adequacy of As-Built Information	RATING	
12. Preparation of Close-out Documents:	RATING	
13. Timely Accomplishment of Punch List:	RATING	
14. Warranty Services:	RATING	
Additional Comments:	TOTAL	
SIGNATURES:	DATES:	
PROJECT COORDINATOR:		
DIRECTOR OF CONSTRUCTION:		

Procedures for Plans Review & Issuing a Building Permit

All construction projects (including, but not limited to, those approved by the Plant Survey, requested through school booster organizations, PTOs, “relocatables” and maintenance, etc.) must be permitted pursuant to F.S. 553.79 & 553.80. Identified below are procedural steps outlining all requirements for plans review and building permit issuance:

F.S. 1013.45(4) states “The services of a registered architect are not required for a minor renovation project for which the construction cost is less than \$50,000, or for the placement or hook-up of relocatable educational facilities that conform to the standards adopted.”

For minor projects (project with a construction cost of less than \$300,000) meeting the requirements of F.S. 1013.45 (4), plans will be required; however, an architect seal will not be required.

Step 1*

Project Coordinator (PC) submits FDOE Forms: (*NOTE: Referenced forms included in Appendix.*)

- OEF 110A -- Project Implementation Information
- OEF 208 -- FDOE Letter of Transmittal (*This form must be reviewed and signed by Director of Construction and Capital Outlay Specialist, with funding source identified.*)
- OEF 208A -- FDOE Facility Space Chart

LCS Code Enforcement office (CE) inputs FDOE forms information into Educational Facilities Information Systems (EFIS). Input date is noted on form.

An internal office folder is created for each project. A permit number is assigned at this time. Checklist is begun on internal “Permit Tracking Form.”

Step 2

Project Coordinator (PC) submits three signed-and-sealed sets of Phase III 100 percent construction documents (plans and specifications) to CE office. One set may be submitted to DOE, for review.

Required plans contain the following information, if applicable:

- | | |
|-------------------------------|------------------------|
| ● Site Plan | ● Life Safety |
| ● Elevations | ● Fire Protection Plan |
| ● Foundation/Structural Plans | ● Wall Section Plan |
| ● Floor Plan | ● Mechanical Plan |
| ● Electrical Plan | ● Plumbing Plan |

* Not required for projects with a construction cost of less than \$300,000.

Plans are placed on “Plans to be reviewed” shelf. Authorized “plans reviewers” in the CE office are notified via email, plans have been received and need to be reviewed. Reminder is placed on CE calendar when comments are due.

Plan reviewers and LCS’ certified building official (CBO) review Phase II (Design Development) and Phase III plans. DOE may review Phase III plans and provide comments within 30 days. Reviewers have 14 days for Phase II and 30 days for Phase III to submit their comments. The comments are saved to the electronic Permitting folder within the project folder of the “P” Drive. Copies are sent to PC and Director of Construction. PC forwards comments to architect and contractor. CBO and plan reviewers are available to discuss comments.

Architect has up to 30 days to respond to both set of comments. Reminder is placed on CE calendar five days before responses are due. If necessary, an email reminder is sent to architect.

CBO is notified when comments are returned from architect. Plans remain in “To Be Reviewed” status until all mandatory comments are satisfied. Once all comments are satisfied, a drawings tube is assigned for project. A letter may be forward from CE and DOE to PC stating “All Mandatories Have Been Met.”

Comments are scanned and saved in electronic project folder. Hard copies are retained in internal office CE folder.

Step 3

Contractor submits Permit Application.

As part of the submission of the Permit Application, the following must be included:

- Insurance certificate with the following: general liability, auto liability, garage liability, excess/umbrella liability, Workers’ Compensation; Proof of Workers Comp exemption, LCS listed as additional insured and the specific project stated on certificate;
- Copy of contractor’s Florida License;
- Subcontractors and their license numbers;
- Product approval;
- Copy of any required environmental permit(s) to be provided by PC.

Forms and application are scanned and stored in electronic projects folder. The originals are placed in CE internal office file(s).

Step 4

Permit is issued once first round of mandatory comment responses are received from architect. Three copies of permit are made -- one copy retained in CE file, one hard copy to “Job File” for contractor, and one copy to Accounting Department for billing purposes. CBO signs and dates all copies.

An invoice is created for an amount relative to the size of the project. The invoice is attached to the copy of the permit that is submitted to Accounting Department.

A “Job File” folder is established for the contractor. The folder includes hard copy of permit, instructions for inspections and hard copies of inspection form.

Contractor is notified to pick up folder. Contractor signs and dates copies of permit. The contractor takes the hard copy of permit and the other copy is retained in CE internal office folder.

Step 5

Inspection Requests — Inspection Request Form must be filled out and submitted at least 24 hours prior to the actual time desired for inspection. Form can be faxed to 850-617-1790 or emailed to LCSCodeEnforcement@leonschools.net.

Step 6

Life safety and fire protection system inspections must occur before the Substantial Completion Inspection is scheduled. A separate inspection request form is required for each of those inspections.

Substantial Completion Inspection should be scheduled on or prior to contract substantial completion date. The architect and/or engineer conduct(s) a separate inspection and develop(s) a punch list of deficiencies. The deficiencies are to be corrected during the period between Substantial Completion Inspection and Final Inspection.

Step 7

Certificate of Substantial Completion (AIA Substantial Completion G704)* signed by the architect and engineer, and including the punch list, is sent to the CE office. The AIA Substantial Completion form is signed by CBO and Director of Construction. This form is scanned to electronic project folder and emailed to PC and architect. Copy is retained for permitting files. Entry is made on CE calendar indicating expected Final Inspection date.

If it is a minor project, an LCS Certificate of Completion is completed, scanned and attached to the Substantial Completion Inspection Request form and retained in permitting files. An entry is placed on CE office calendar indicating expected Final Inspection date.

Step 8

Final Inspection is scheduled.

Step 9

Once inspection is complete, the architect/engineer sends a letter to CE office stating that all items on the punch list have been completed and stating that the project is final. Letter is scanned and stored in electronic project folder. Hard copy is retained in permitting files.

If a minor project, once inspection is complete, an LCS Certificate of Final Inspection is completed and attached to the Final Inspection Request form and retained in permitting files. Form is scanned and saved in electronic project folder.

Step 10

Certificate of Final Inspection (OEF Form 209)* signed by architect is submitted to CE office. Form is signed by LCS Superintendent's designee and CBO. Form is input into EFIS. Input date is noted on form. Form is scanned and stored in electronic project file. Hard copy is retained in permitting files.

* Not required for projects with a construction cost of less than \$300,000.

Architect/engineer completes Certificate of Occupancy (OEF 110B)* and submits to CE office. Form is signed by LCS Superintendent's designee and CBO. Form is input into EFIS. Input date is noted on form.

If a minor project, an LCS Certificate of Final Inspection and an LCS Certificate of Occupancy or an LCS Certificate of Completion is issued by CE office and signed by CBO.

Forms are scanned and stored in electronic project folder. Hard copy is retained in permitting files.

Step 11

Hard copy of permit is returned to CE office and signed by inspectors and CBO as final. Finalized copy is retained in permitting files.

Finalized copy of permit is scanned and emailed to project coordinator, architect and contractor and saved to the electronic project folder. Hard copy is retained in permitting files.

Copies are made of finalized permit and LCS Certificate of Occupancy and submitted to Accounting Department.

*Not required for projects with a construction cost of less than \$300,000.

Estimates/Cost of Construction

District Estimate in Planning Phase

The initial project estimate will be generated by the LCS Facilities & Construction staff during the planning phase. The estimate will be developed based on FDOE student station costs, FDOE cost of construction square foot costs, and District historical construction cost data. This estimate, along with the project scope of work, will be provided to the architect upon selection and contract approval by the School Board.

Design Phase Estimates

- **Architects Contract Basic Services**
 - Phase I / Schematic Design 3.2.2: “The architect shall prepare a preliminary evaluation of the Owner’s program, schedule, and budget for the Cost of the Work.”
 - Phase II / Design Development 3.3.2: “The architect shall update the estimate of the Cost of the Work.”
 - Phase III / Construction Documents 3.4.4: “The architect shall update the Cost of the Work.”

- **Construction Manager Pre-Construction Basic Services**
 - “Providing preliminary evaluation of the program and Project budget.”
 - “Preparing an estimate of construction cost based on the Design Development Documents.”
 - “Advising Owner and Architect if it appears that the construction cost may exceed the Project budget.”

Educational Specifications (Ed. Specs.) will help control cost while standardizing quality products and materials used in LCS projects.

Cost Data for Estimating and Benchmarking LCS Construction Costs

- **DOE Cost Per Student Station**
 - F. S. 1013.64 (6)(b) limits the per student station cost of construction and is adjusted annually to reflect increases and decreases in the Consumer Price Index.
 - Cost Per Student Station Limitations for schools can be found at www.fl DOE.org/finance/fco/cost-of-construction/public-schools.stml.

- **FISH (Florida Inventory of School Houses) Estimating Cost**
 - DOE Cost Per Square Foot for use in Replacement Studies can be found at www.fldoe.org/core/fileparse.php/7735/urlt/0075341-brci.pdf.

- **DOE Annual Cost of Construction Reports** can be found at (www.fldoe.org/finance/fco/cost-of-construction/public-schools.stml)

Best Practices & Ongoing Evaluation

The objective of this section of the manual is to evaluate the quality of work being done by the LCS Facilities & Construction Department within the context of the “best practice” standards developed by The Florida Legislature’s Office of Program Policy Analysis & Government Accountability (OPPAGA).

OPPAGA was created by the Legislature in 1994 to help improve the performance and accountability of state government. As the research arm of the Legislature, OPPAGA has developed a package of Best Financial Management Practices for assessing the performance of Florida’s 67 county school districts. The best practices -- which have been adopted by the state Commissioner of Education and the state Auditor General – address the following components of the public education program:

- Management Structures
- Performance Accountability Systems
- Educational Service Delivery
- Administrative and Instructional Technology
- Personnel Systems and Benefits
- **Facilities Construction**
- Facilities Maintenance
- Transportation
- Food Service Operations
- Cost Control Systems
- Best Practices for All Areas

Following is a December 2014 “self- assessment” of the Leon County School District’s performance in the area of Facilities Construction based on the OPPAGA criteria. The LCS Facilities & Construction Department plans to conduct this self-assessment on an annual basis as a means of monitoring its ongoing performance within the context of the OPPAGA standards.

Facilities & Construction will conduct a department-wide performance evaluation at least once every two years. The goal of the performance evaluation is to ensure that the department is adhering to best practices in the areas of planning, budgeting and contract administration, construction practices, record-keeping and transparency. This evaluation will include the OPPAGA self-assessment; an audit of the official project files to ensure that records are complete and in accordance with the project checklist; a review of employee performance evaluations and organizational structure; an evaluation of construction costs including comparison to projects of other districts throughout the state; an evaluation of construction practices for contract adherence, performance and cost-effectiveness; and an audit of financial statements and records.

**Best Financial Management Practices With Their Associated Indicators
Adopted June 2002**

Name	Jim Connell	Telephone No.	850-617-1806
Position/Title	Chief – Facilities & Construction	E-mail Address	connellj@leonschools.net
County/Organization	Leon County School District		

FACILITIES CONSTRUCTION

<i>Best Practices and Indicators</i>	<i>Yes</i>	<i>No</i>	<i>N/A</i>	<i>Explanation/Documentation</i>
Construction Planning ¹				
1. The district has effective long-range planning processes. ²				
a. The district has established a facilities planning committee that includes a broad base of school district personnel, parents, construction professionals, and other community stakeholders. The board specifies the role and responsibility of the committee, provides a forum for the committee to offer the board recommendations, and establishes the committee’s goal and interim reporting targets.	X			<p>1. District has an established Capital Outlay Committee (see 8(a) below). Its 15 members include one School Board member and three community members. For the past several years, long-range facilities planning has been a facilities staff function driven largely by nine capital outlay priorities described in Policy 7100 -- Facilities Planning (http://www.neola.com/leon-fl/search/policies/po7100.htm)</p> <p>Capital Outlay Committee considers requests related to long-range facilities planning from District directors and has been District’s primary vehicle for compliance with F.S. 1013.35.</p> <p>2. District intends to re-establish a Facilities Planning Committee to more effectively and efficiently address requirements of F.S. 1013.35. Its primary</p>

¹ Senate Bill 1906, passed during the 2002 Legislative Session, changes intergovernmental coordination and planning and requires district participation in the region’s comprehensive planning process. It combines the Educational Plant Survey and the Five-Year Educational Facilities Work Plan into a comprehensive planning document; The Educational Facilities Plan. Staggered submission of interlocal agreements, which will include the new Educational Facilities Plan, will begin March 1, 2003 and conclude December 1, 2004. The implementation of the new law will have an impact on the structure of the BFMP reviews.

² Long-range covers 5-20 years out.

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Adopted June 2002

				<p>responsibilities will be: preparation of tentative District educational facilities plan, including long-range planning for needs related to facilities in coordination with other local governments; maintaining an updated inventory of existing school facilities, including anticipated expansions or closures over 5-year, 10-year and 20-year periods; development of a financially feasible facilities work program for 5-year period, including projected costs for each project; other requirements as described in F.S. 1013.35.</p> <p>3. District's planned Facilities Planning Committee membership includes Construction staff members, community representatives and representatives from local government partners. This joint collaboration will bolster consistency between tentative District educational facilities plan and local Comprehensive Plan.</p>
<p>b. The district has established authority and assigned responsibilities for facilities planning.</p> <ul style="list-style-type: none"> • The district uses accurate and relevant planning information through professionals knowledgeable in facilities planning, design, and construction. • The district addresses the feasibility and cost-effectiveness of alternative program solutions. • The district evaluates existing facilities support of current and planned programs and activities. • The district has an opportunity to reassess goals and objectives and to plan further programs and activities. • The district reassesses the educational program and identified future needs. 	X			<ol style="list-style-type: none"> 1. Facilities staff and construction managers are jointly responsible for utilizing accurate and relevant planning information in various disciplines related to facilities planning. This includes analyses of cost-effectiveness and alternative program solutions. 2. Principals and teaching and learning administrators are involved in planning and assessment of alternative program solutions. By improving coordination between program and facilities planners, efficiency and cost-effectiveness will be improved. This can be accomplished via re-established Facilities Planning Committee. 3. Supplemental surveys utilized to reassess educational program and future needs.

***Best Financial Management Practices With Their Associated Indicators
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c. The district estimates facilities and site needs based upon demographic projections that are regularly updated. ³	X			Capital outlay specialist on facilities staff is responsible for: estimating and updating facilities and site needs based on demographic projections.
d. The district prepares a comprehensive Five-Year Educational Plant Survey in accordance with Florida law.	X			Yes.
e. The district uses FISH data in conjunction with recent student occupancy surveys to ensure that the district is making optimal use of building capacity. ⁴	X			Yes. Facilities Planning Committee will provide additional oversight and review.
f. The district routinely assesses facilities for physical condition, educational suitability, and technology readiness. A uniform checklist was used to provide evaluation criteria related to <ul style="list-style-type: none"> • site size and layout; • space (size, number, utility, and flexibility of various areas in the facility and the relationships of these areas to each other); • light, heat, and air; • acoustics; • aesthetics; • equipment; • availability of utilities; • hazardous materials; • maintenance; • structural adequacy; • adaptability to change; and • fire safety; and/or other health, sanitation, safety issues and future operational and maintenance costs. 	X			These things are assessed on ongoing basis through five-year facilities plan and SREF, in accordance with LCS Policy.
g. Is there other information that demonstrates the district's use of this best practice that should be considered?				
2. When developing the annual five-year facilities work plan the district evaluates alternatives to minimize the need for new construction.				

³ The district's enrollment projections are based on student data provided by the Florida Department of Education and factors such as land use, geographical limitations and developable land, local ordinances that regulate the rate of growth of the area, forecasts of economic conditions reported by the private sector, vocational opportunities in the community, availability of community services, major highway and street networks and their probable future development.

⁴ FISH data should be updated on a monthly basis and when new facilities come on-line or old facilities are phased out.

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a. The district evaluates, in writing, alternatives to new construction that could reduce the demand for new construction. ^{5,6}	X			District projects enrollment numbers as part of annual five-year facilities work plan.
b. New school facilities are planned to accommodate expansion through relocatables or permanent facilities when changes in demographics or rapid growth can be anticipated.	X			Work plan projects number of relocatables and capacities. Projections derived from Five-Year Educational Plant Survey.
c. The school district has considered joint-use agreements that share the construction, operation, and maintenance costs of a multi-use complex with a local municipal or county government, further reducing the construction costs of its schools.	X			Joint-use agreements involve use of District facilities by other local governments, nonprofits and individuals. Statutory limitations (for example, the Jessica Lunsford Act), restrict District's ability to use facilities owned by other local governments.
d. When appropriate, the school district considers building regional multi-use complexes to be shared by middle and high schools.	X			District operates two regional multi-use facilities: at Chiles High School on north side; and near Fairview Middle School, at Cox Stadium.
e. The five-year facilities plan allows for construction only when needs cannot be met through other means.	X			Five-year plan includes remodeling and renovation of facilities where new construction is not feasible or is cost prohibitive.
f. Is there other information that demonstrates the district's use of this best practice that should be considered?				
3. The five-year facilities work plan establishes budgetary plans and priorities.				
a. The five-year facilities work plan identifies sources of funds and accurately itemizes the costs of facility needs such as site purchase, new construction, remodeling, renovation, the long-term use of relocatables, site improvement, and deferred maintenance.	X			Facilities Planning Committee will produce more precise cost estimates and projections related to site purchase, renovation, site improvement, deferred maintenance, etc.
b. District effectively prioritizes construction needs to meet highest needs first. <ul style="list-style-type: none"> • Projects including instructional capacity are given higher priority than administrative or support projects.⁷ • Construction and renovation priorities are established to ensure equitable treatment of all areas within the district. 	X			As noted above, District follows nine priorities established in Policy 7100 -- Facilities Planning. In addition, District uses work plan priorities to require equitable treatment.

⁵ This compares the advantages and disadvantages of each of the alternatives including long- and short-term cost implications.

⁶ Possible alternatives include, but are not limited to, year-round education, extended day schools, block scheduling, changes in grade level configuration, changes in zoning, use of relocatable facilities (portables).

⁷ Under extraordinary circumstances the district may be able to justify giving administrative or support needs higher priority, but this should be carefully reviewed.

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c. The established budget incorporates inflation factors that may affect future construction costs.	X			Construction and renovation cost estimates are based on inflation estimates obtained from DOE Facilities website.
d. Is there other information that demonstrates the district's use of this best practice that should be considered?				
4. The school board ensures responsiveness to the community through open communication about the construction program and the five-year facilities work plan.				
a. The school board holds regular hearings at which information regarding the construction program is provided.	X			Capital outlay update is provided to Board at every Board meeting.
b. The school board provides a clear explanation of each construction project in a format that allows for public response.	X			Board approves capital outlay projects that are advertised each year in <i>Tallahassee Democrat</i> newspaper.
c. Is there other information that demonstrates the district's use of this best practice that should be considered?				
5. The district has an effective site selection process based on expected growth patterns.				
a. The district begins school siting decisions well in advance of future need based on expected demographic changes.	X			District maintains ongoing oversight of community growth and development that impacts school needs in compliance with F.S. 163 and F.S. 1013.
b. The facilities planning committee, or a similar committee, reviews areas for potential sites and provides input regarding site acquisitions.	X			This takes place as needed.
c. Is there other information that demonstrates the district's use of this best practice that should be considered?				
6. The board considers the most economical and practical sites for current and anticipated needs, including such factors as need to exercise eminent domain, obstacles to development, and consideration of agreements with adjoining counties.				
a. The district has established appropriate site selection criteria that incorporate: <ul style="list-style-type: none"> • the requirements of sections 235.054, 235.19, and 235.193, <i>F.S.</i>, and Section 1.4(2), State Requirements for Educational Facilities 	X			LCS Policies 7100 and 7240 establish clear policies relating to suitable sites.

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(SREF) and follow basic acquisition procedures and ⁸				
<ul style="list-style-type: none"> safety, location, environment, soil characteristics, topography, size and shape, accessibility, site preparation, public services, utilities, costs, availability, political implications (zoning, environmental impact report requirements, joint use, etc.), transportation of students, and integration. 				
b. The district determines the most economical and practical locations for sites based on its established criteria and its ranking of potential sites. ⁹	X			Confirming information contained in site selection reports and agendas for most recent schools constructed (Chiles H.S., Conley E.S., Montford M.S., Roberts E.S., Swift Creek M.S.).
c. The district properly anticipates and evaluates obstacles to development. ¹⁰	X			District maintains ongoing oversight of community development plan reviews by city/county governments for early identification of possible obstacle in compliance with F.S. 163 and F.S. 1013.
d. When appropriate, the board considers condemnation to acquire selected sites.			X	Has not been required. Would be last resort.
e. Prices paid for sites reflect fair market value based on independent appraisals that were obtained as specified in Florida law. ¹¹	X			LCS follows all statutory requirements for appraisals.
f. The district has an effective mechanism/process to reconcile differences in appraisals.	X			If there are differences in appraisals, District negotiates to arrive at a decision favorable to LCS.
g. Sites selected meet the previously established selection criteria.	X			District has complied with Florida Statutes and interlocal agreements.
h. Is there other information that demonstrates the district's use of this best practice that should be considered?				
Construction Funding				
7. Funds collected for school projects were raised appropriately.				
a. The district can demonstrate that if local bond referendum proceeds were used, the scope of each project was spelled out in the bond resolution.			X	<ol style="list-style-type: none"> Local bond referendum proceeds last used in 1987. Proceeds used to complete all

⁸ This could include receiving recommendations from site-election specialists or real estate/ development professionals, planning acquisition prior to the projected need, Reviewing potential sites and recommend sites to the Board in priority order.

⁹ This is based upon full development costs.

¹⁰ This could include transportation plans, zoning, environmental concerns, and neighborhood concerns for each site considered.

¹¹ See s. 235.054, F.S.

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				advertised projects.
b. The district can demonstrate that if local sales-surtax revenue was used to finance any project, the scope of that project was spelled out in sales-surtax referendum resolution advertisement.	X			<ol style="list-style-type: none"> 1. In Nov. 2002 and 2012 voters approved ½ cent sales tax for school construction, renovation and remodeling. 2. The scope of each project has been advertised as required by statute in local print media. 3. Each project also has been advertised on large billboards at each specific school site. 4. Information on each project has been posted on LCS web site.
c. The district has evaluated in writing the advantages and disadvantages of alternative methods for funding and financing construction projects when developing its capital-planning budget.	X			Yes, as evidenced by CIRT report as well as numerous workshop materials available from LCS Finance Dept.
d. In order to increase construction funding, the district first maximizes the use of local revenue alternatives.	X			Yes, as evidenced by passage of ½ cent sales tax to fund capital outlay needs.
e. Is there other information that demonstrates the district’s use of this best practice that should be considered?				
8. The district approves and uses construction funds only after determining that the project(s) are cost-efficient and in compliance with the lawfully designated purpose of the funds and the district's five-year facilities work plan.				
a. Approved uses of construction funds have been determined by the district’s finance director to be in compliance with the lawfully designated purpose of the funds ^{12, 13, 14} (<i>Basic Indicator</i>)	X			Each fiscal year Capital Outlay Committee recommends to Superintendent a budget for projects designated within the five-year plant survey. The Superintendent submits the budget to the School Board for approval. Director of Finance enters Board-approved project into accounting system based on funding source. When construction projects during the fiscal year are submitted for Board approval, Director of Finance verifies that budgetary capacity is available and that indicated funding source is accurate.

¹² See s. 236.25, F.S.

¹³ Approved by the district school board.

¹⁴ This includes renovation, remodeling, or upgrading.

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				Board-approved projects are encumbered by Director of Finance. Construction projects are managed by facilities staff. Invoices for these projects are submitted to Director of Finance. Invoices are verified against projects in budget before payment is made.
b. The district submits all reports required to assure construction funding to the Department of Education. ¹⁵	X			The 12-month PECO Capital Outlay Projection and Request for Project Encumbrance Authorization reports, when funds are available, are properly submitted to DOE. Capital Outlay Bond Issue Form for participation in CO&DS bond sale is facilitated by Finance Dept. with input from facilities staff about projects to be financed. Five-Year Plant Survey and other reports are prepared and submitted by facilities staff.
c. The district does not use funds from the Public Education Capital Outlay and Debt Service Trust Fund or the School District and Community College District Capital Outlay and Debt Service Trust Fund for any new construction of educational plant space with a total cost per student station, including change orders, that exceeds the amounts specified in Florida law. ^{16, 17}	X			Public Education and Capital Outlay (PECO) funding and Capital Outlay and Debt Service (CO&DS) -- when available for student station construction -- will be compared to the total cost per student station, including change orders.
d. The district uses the school tax defined in Florida law, as 1.5-mill money for construction, renovation, and other authorized purposes. ¹⁸	X			The 1.5 mill money is advertised according to the Truth in Millage (TRIM) statute for construction, renovation, and other authorized purposes. The 1.5 mill tax expenditures are accounted for in a specific fund for those projects. Capital Outlay Committee considers 1.5 mill revenue within all available capital funding sources and establishes projects accordingly within Five-Year Plant Survey.
e. The school board uses state funds in a timely manner.	X			State funds are utilized in a timely manner. The District's capital needs

¹⁵ Required reports include Survey for Validation (s. 235.15, *F.S.*); Project Implementation Information for projects over \$200,000 (SREF 4.1 (97)); (s. 235.26(c), *F.S.*); Project Priority List for use of CO&DS bond funds (section 9(d), Article XII, state constitution); Twelve-month PECO Capital Outlay Projection and Request for Project Encumbrance Authorization (s. 235.14, *F.S.*); and Florida Inventory of School Houses Update (s. 235.014, *F.S.*). Optional reports include Letter of Transmittal, Facility Space Chart, and Life Cycle Cost Analysis for projects with department plan review assistance (SREF and s. 235.26, *F.S.*); Capital Outlay Bond Issue Form for participation in CO&DS bond sale.

¹⁶ If the district applies for a waiver they fail to meet the best practice.

¹⁷ See s. 235.435(6)(b)1., *F.S.*

¹⁸ See s. 236.25(2), *F.S.*

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				far exceed available revenues. Capital Outlay Committee budgets, expenditures and projects are implemented in timely manner to utilize state revenues.
f. All available capital resources are applied towards the five-year facilities work plan and limited use capital funds are not diverted to other lower priority allowable uses. ^{19, 20}	X			Capital Outlay Committee prioritizes budget to emphasize budgeting for documented needs in five-year facilities work plan. Unused budget for prior-year projects that are no longer part of five-year plan are used for updated five-year plan purposes. The annual financial report provides accounting for all capital outlay expenditures. Notes to financial statements within that report describe asset additions and deletions. A project report has not been published listing beginning project balance, expenditure, encumbrances, and ending project balance.
g. Is there other information that demonstrates the district's use of this best practice that should be considered?				
Construction Design				
9. The district develops thorough descriptions and educational specifications for each construction project.²¹				
a. The educational specifications effectively address educational program components. ²²	X			<ol style="list-style-type: none"> 1. District complies with SREF requirements. 2. Building code official reviews plans and sends approved documents to DOE for projects exceeding \$200,000.
b. Program goals, objectives and activities, and teaching strategies and instructional methods have been defined based on staff input.	X			<ol style="list-style-type: none"> 1. School principals are involved in the planning process. 2. Facilities staff input is fundamental to every project.

¹⁹The board has deleted items from the list of previous year expenditures that do not relate to facilities improvements.

²⁰The district facilities director provides the board and the public a full accounting of the use of all capital funds.

²¹This includes such descriptions as a rationale for the project; a determination of the size of the facility and that it meets the space requirements of current *Laws of Florida*; a determination of the grade level the facility will serve; a determination of whether the new facility will serve all parts of the district on an open enrollment basis or will be a "magnet" school or a special school; a map has been prepared that shows the location of the planned facility within the community and the proposed attendance area of the school; construction budget that meets the state averages or requirements of current *Laws of Florida*, relative to cost per student station; the source of funding for the project; planning and construction time line; durability and maintenance costs; an estimate plan for the time of construction; the date of completion and opening.

²²Such as the curriculum, instructional methods, staffing, and support services; also included is a statement of the school's philosophy and program objectives.

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c. The needs and design implications of advanced technology such as computers, integrated networks, and satellite transmissions and reception have been identified.	X			District's Technology and Information System organization identifies specific design implications.
d. New facilities are designed to be adaptable to changes and innovations in education and flexible enough to accommodate a variety of program uses. Interior spaces are simple with inherent versatility. ²³	X			Classrooms designed for easy conversion to computer labs and to accommodate implementation of new technology.
e. The specifications effectively address spatial relationships. ²⁴	X			District follows SREF guidelines.
f. Educational specifications comply with the "small schools" requirement. ²⁵			X	Not applicable to District.
g. Is there other information that demonstrates the district's use of this best practice that should be considered?				
10. The architectural design fulfills the building specification needs as determined by the district.				
a. The district submits the educational specification and communicates all program requirements to the architect before the commencement of written specifications and schematic drawings.	X			Although District does not submit educational specifications <i>per se</i> , staff communicates detailed program needs to architect before project commencement.
b. The planning leader, the users of the facility and the architect and engineers have matched the written specifications and schematics against the educational specifications. The planning leader, design professionals and principal verify in writing that the final plans represent the district's needs. ²⁶	X			<ol style="list-style-type: none"> 1. Written specifications and schematics are matched against SREF and Florida Building Code. 2. Principals represent interests of their school's constituencies. 3. District has required sign-off sheet for schematics, and 80% and 100% construction documents. Sign-off sheet first issued on Aug. 16, 2010, and revised Oct. 29, 2013.
c. The district communicates its findings and recommendations for every step of the design process to the school board.	X			<ol style="list-style-type: none"> 1. District staff communicates its findings and recommendations at each step of design process to design professional. 2. Phase III documents are conveyed to Board for approval and submission to DOE.

²³This includes variable group size, individualized instruction, team teaching, peer tutoring, cooperative learning, interdisciplinary teaching, use of computers, year-round education, and before- and after-school use.

²⁴This includes consideration given to the location and size of the various spaces within and surrounding a facility, the association of those spaces and the ability of individuals to interact between and within the spaces.

²⁵Schools must be built or operated in accordance with the "small schools" requirement. Refer to s. 235.2157, F.S.

²⁶The users include teachers, students, parents, site administrators, maintenance, safety, and district administrators.

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d. Is there other information that demonstrates the district's use of this best practice that should be considered?				
11. New construction, remodeling, and renovations incorporate effective safety features.				
a. Appropriate safety features are incorporated into the design of all new construction. ²⁷	X			All plans are reviewed by Safety and Security staff for assessment based on CPTED (crime prevention through environmental design) strategies.
b. Whenever facilities are renovated, safety needs are assessed and safety designs are revised or added to the facility. ²⁸	X			Using CPTED strategies, Safety and Security routinely reviews renovation plans as part of the renovation process.
c. Is there other information that demonstrates the district's use of this best practice that should be considered?				
12. The district minimizes construction and maintenance costs through the use of cost-effective designs, prototype school designs, and frugal construction practices.				
a. When selecting designs for new construction the district evaluates and compares the costs of construction for various designs using school prototypes, energy conservation, life cycle costing, and operation of the facility. ²⁹ <i>(Basic indicator)</i>	X			M.S. constructed through re-use of Deer Lake M.S. design.
b. The district has a written policy that encourages the design team to comply with the district's SMART school design philosophy and develop practical design solutions that are functional and cost-effective and when possible the district selects construction designs that will earn SIT awards for frugal construction practices.	X			See Policy 7100 -- Facilities Planning (http://www.neola.com/leon-fl/search/policies/po7100.htm)
c. The district uses the results of the life cycle cost analyses to design, construct, select equipment for, and furnish new facilities to minimize maintenance and operations costs.	X			Yes, as required by Florida Statutes and the Dept. of Education.
d. Consideration has been given to maximizing passive design and "green architecture" concepts and techniques such as building orientation,	X			District follows SREF guidelines and DOE-OEF 208.

²⁷ Features include limited access entrances, sufficient entrances and exits, signs, and front desks having views of the entrance.

²⁸ These needs and designs include lighting, break-proof doors, security systems, fencing, and window or door bars. Essentially, is safety reviewed and addressed as part of the renovation process?

²⁹ See s. 235.0155, F.S.

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shading walls and fenestration, using light colors on exterior walls and roofs, etc. to take advantage of, or minimize the negative impact of, the prevailing environmental influences.				
e. The district regularly assesses and revises facility designs and construction practices to ensure it minimizes maintenance and operations costs based on appropriate standards from comparable school districts, government agencies, and private industry.	X			As appropriate, data from comparable school districts, government agencies and private industry are considered.
f. Is there other information that demonstrates the district's use of this best practice that should be considered?				
New Construction, Renovation and Remodeling				
13. The district has effective management processes for construction projects.				
a. The school district has a written evaluation of the potential costs and benefits of privatizing part or all of the construction program.			X	
b. The district has considered alternative delivery methods including but not limited to design/build and turnkey.	X			Construction manager, hard build, and day labor methods also considered and used.
c. The district has assigned one person with the authority and responsibility to keep facilities construction projects within budget and on schedule. <ul style="list-style-type: none"> • The district has determined the credentials and construction-related experience required of the manager for each project. • Each project manager reports directly to the individual responsible for implementing the five-year facilities work plan. • The project manager is held accountable for keeping facilities construction projects within budget and on time. 	X			Director of Construction oversees three project coordinators who are responsible for implementing the five-year educational plant survey. Project Coordinators, along with the Director of Construction, are held accountable for timely completion of projects within budget.
d. The school board establishes a "not-to-exceed" cost. ³⁰		X		This does not reflect District's current way of work. District estimates a project budget. Change orders are approved by the School Board per Policy 6345 -- Change Orders to Construction Contracts (http://www.neola.com/leon-fl/search/policies/po6345.htm)
e. Is there other information that demonstrates the				

³⁰The total project amount, including change orders, for each new project prior to the beginning of the initial planning phase is limited and cost-per-student station contract amount for each new project prior to the beginning of the initial planning phase is limited.

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district's use of this best practice that should be considered?				
14. District planning provides realistic time frames for implementation that are coordinated with the opening of schools.				
a. The tasks for achievement of all phases of each project have been incorporated and timed to coordinate with the opening of schools. When time frames are not met, the district revises them accordingly and identifies why they were not met, with updates provided to the board and public. ³¹	X			This is the top priority of the construction staff. Principals are regularly informed of progress on projects, and significant changes are reported to the Board and the school community.
b. The plan contains an accountability component that provides assurance to the board and to the public that the projects addressed in the plan will be implemented at the proposed budget levels within the time frame outlined. ³²	X			The contract is the primary accountability component. Per footnote #32, the Director of Construction and Project Coordinators have the main responsibility for ensuring timely completion of projects within budget.
c. The board receives budget updates at the completion of each phase of design. ³³		X		Construction staff receives budget updates at completion of each phase of design.
d. Is there other information that demonstrates the district's use of this best practice that should be considered?				
15. All projects started after March 1, 2002, comply with the Florida Building Code.				
a. The appropriate district personnel can demonstrate their knowledge and understanding of the <i>Florida Building Code</i> . ³⁴	X			District staff members conducting inspections and certifying building completeness for occupancy are certified, licensed professionals. They are provided opportunities for CEU credits and are encouraged to join professional organizations that will help them stay abreast of latest codes and business practices.
b. The district has procedures in place to ensure that all projects with dates of construction contracted after March 1, 2002, comply with the permitting and inspection requirements of the <i>Florida Building Code</i> .	X			District's permitting office ensures that all projects with dates of construction contracted after March 1, 2002, comply with code permitting and inspection requirements.

³¹ This includes site purchases, board actions, procurement cycles, interface with local and state entities, contingencies for weather delays, etc., and the district has met its planned time frames.

³² The board has delegated adequate decision-making authority and holds the long-range plan manager accountable to resolve issues in a timely manner and keep the master plan on time and within budget.

³³ There are quarterly reporting systems required that contain status, schedule, task/time assessments, budget update, program update, potential problems, and critical issues.

³⁴ This means that the appropriate personnel have received training in the Florida Building Code or can justify not needing training.

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c. Is there other information that demonstrates the district's use of this best practice that should be considered?				
16. The district requires appropriate inspection of all school construction projects.				
a. The district requires inspection by competent building code professionals that complies with Ch. 235, <i>F.S.</i> , and the requirements of the <i>Florida Building Code</i> . ³⁵	X			This includes new construction, renovation, remodeling, or alteration projects, for installation of relocatables, for day labor projects and for maintenance.
b. A final inspection is conducted and a certificate of occupancy is issued before buildings are occupied.	X			Per OEF forms 110-B and 209.
c. If the facility does not pass inspection, the district can document the reasons for failure and the corrective steps taken.	X			Any failed inspection is documented and immediate corrective measures are taken before construction continues. In some cases, alternative methods that meet code requirements are taken to address a failed inspection.
d. The district files the appropriate documentation with the Department of Education and updates its FISH data. ³⁶	X			This is standard District practice.
e. Is there other information that demonstrates the district's use of this best practice that should be considered?				
17. The district retains appropriate professionals to assist in facility planning, design, and construction.				
a. The district uses a selection committee to find appropriate professionals for each construction project who are familiar with architecture, design and construction, and engineering.	X			The facilities planning committee's responsibilities include finding appropriate professionals qualified in their respective disciplines.
b. The district can demonstrate that professionals were selected early in the planning process, in compliance with ss. 287.055 and 235.211, <i>F.S.</i> , and that the committee screened written applications in order to select an appropriate number of professionals to interview and that the selected candidates were interviewed. <i>(Basic Indicator)</i>	X			Generally speaking this has been the District's practice.
c. The district considers alternative project delivery methods including but not limited to design/build and turnkey and bases the selection of the appropriate professional on the type of project management selected.	X			District has considered construction manager, hard bid, and day labor delivery methods for construction projects.

³⁵ This includes new construction, renovation, remodeling, or alteration projects, for installation of relocatables, and for day labor projects.

³⁶ Documentation includes a certificate of occupancy.

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d. Interviewers consider experience; adequacy of technical and support personnel and availability of particular individuals for the type of project management selected; the proximity of the candidate's office to the district; thoroughness; creativity within the context of sound construction practices and wise expenditures of public funds; adequacy of project supervision; sound business procedures and record keeping on the job; financial responsibility; suitability of size and type of organization; methods of operation; willingness of the candidate to make changes in plans at various points in the process; ability and inclination of the candidate to protect the district's interests in his or her dealings with the contractor; minority business enterprise status; and references contacted when selecting project professionals.	X			District follows process prescribed in Consultants' Competitive Negotiations Act (F.S. 287.055) with regard to selecting most qualified firms.
e. The district can demonstrate that finalists were evaluated based on interviews; visits to examples of their work; interviews with previous clients; examination of typical documents such as plans, specifications, and change orders; and visits to the architects' offices.	X			See previous response.
f. The district can demonstrate that the contracts with professionals include all of the district's requirements; meet the requirements of current law; and clearly state the amounts and methods of compensation; and that compensation does not encourage overbuilt or extravagant project costs.	X			Amounts in District contracts are based on Florida DMS fee curves. Contracts limit payout amounts for various contract phases.
g. Is there other information that demonstrates the district's use of this best practice that should be considered?				
18. The district follows generally accepted and legal contracting practices to control costs.				
a. For each new project started in the past three years, the board considered using alternative bidding and construction systems. ³⁷		X		

³⁷ This includes cost, long-term quality of construction, and management implications of using a construction system such as design/build, construction manager, or construction manager at-risk versus the traditional construction system prior to selecting the type of contracting and construction system to use.

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<p>b. The board uses generally accepted bidding procedures including:</p> <ul style="list-style-type: none"> • bids opened at the exact time advertised and inspected to confirm that all required documents are in order;³⁸ • after bids are opened, they are submitted to the board for awarding of the contract; • when contracts were negotiated, all provisions of law were met; • legal counsel reviewed contract documents; • contracts are awarded to the lowest responsible bidder whose bid met the specifications or to the construction manager or design build contractor selected pursuant to s. 287.055, F.S. 	X			<p>After hard bids are opened, they are posted publicly and a purchase order is awarded based on Board approval.</p>
<p>c. Each contract is signed by the appropriate district official and that each contractor awarded a contract has submitted the following:</p> <ul style="list-style-type: none"> • a signed owner-contractor agreement; • a workers' compensation insurance certificate, a payment bond; and • a performance bond, a guarantee of completion within the time required or other requirements as needed. 	X			<p>Bids are awarded to a contractor that has met bid specifications. Alternatively, contracts may be awarded to a construction manager or design building contractor selected pursuant to F.S. 287.055.</p>
<p>d. Is there other information that demonstrates the district's use of this best practice that should be considered?</p>				
<p>19. The district minimizes changes to facilities plans after final working drawings are initiated in order to control project costs.</p>				
<p>a. The district uses contracting methods that minimize change orders and all changes to facilities plans after final working drawings are initiated require board approval.</p>	X			<p>District uses contracting methods that attempt to minimize the need for change orders. All change orders and amendments to professional services vendors require Board approval.</p>
<p>b. The district can document the reason for any change orders and the person responsible for making them.</p>	X			<p>Documentation for change orders includes reason for request and person submitting request.</p>
<p>c. Change orders implemented do not result in the project exceeding budget, do not compromise educational specifications, do not exceed industry standards, and do not extend the completion date beyond the date projected, unless unforeseen circumstances occur.</p>	X			<p>Change orders, which require Board approval, may sometimes result in exceeding initial project estimate. Change orders do not compromise project specifications, however, and do not exceed District standards.</p>

³⁸ Documents include signed bid form, with dollar amount; bid bond; designation of sub-contractors; a non-collusion affidavit; and certificates regarding worker's compensation and liability insurance.

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d. Is there other information that demonstrates the district's use of this best practice that should be considered?				
20. The architect recommends payment based on the percentage of work completed. A percentage of the contract is withheld pending completion of the project.				
a. The architect recommends payment based on the percentage of work correctly completed and in conformance with the contract documents.	X			Architect or engineer recommends payment based on percentage of work completed in conformance with contract documents.
b. Payments are made to contractors on the basis of requests for payment reviewed by the architect.	X			Payments are made to contractors on basis of requests for payment reviewed and certified by architect or engineer.
c. A percentage of the contract is withheld pending final completion of the project to cover non-conforming work that must be corrected prior to occupancy.	X			This is standard District practice. Release of retainage requires Board approval.
d. The district has a system of internal controls to ensure that timely payments are made only after the architect's approval of the work completed, and with the concurrence of the district's project manager in charge of the project.	X			Standard District practice.
e. Is there other information that demonstrates the district's use of this best practice that should be considered?				
Facility Occupancy and Evaluation				
21. The district conducts a comprehensive orientation to the new facility prior to its use so that users better understand the building design and function.				
a. The district provides a customized orientation program for maintenance personnel and school staff. ³⁹	X			Standard District practice.
b. The architect, the facilities planner, the contractor, and/or the educational administrator share the responsibility for the orientation program.	X			Architect, Project Coordinator, contractor and/or educational administrator share responsibility for orientation program.
c. Is there other information that demonstrates the district's use of this best practice that should be considered?				

³⁹ The orientation program should include clear and understandable users' manuals designed for the appropriate staff. The program may also need to be customized to the particular type of user (i.e., maintenance staff or teacher).

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22. The district conducts comprehensive building evaluations at the end of the first year of operation and regularly during the next three to five years to collect information about building operation and performance.				
a. A comprehensive evaluation that assesses facility use and operating costs, as well as building operation and performance, is conducted by the end of the first year of occupancy. ⁴⁰	X			<ol style="list-style-type: none"> 1. Walk-through is conducted one year after project completion. 2. Building and operating costs are monitored by Maintenance (mechanical), Construction (energy consumption), internal bookkeeping and Finance Dept.
b. Additional evaluations are performed at appropriate intervals during the first three to five years of operation.	X			<ol style="list-style-type: none"> 1. Utility consumption is tracked. 2. Work order history is reviewed. 3. Principals, administrators, parents and students are interviewed to gather input on operations.
c. Results of evaluations are used to compare the product with educational specifications to see whether the district received the product it said it wanted, and whether the district still needs the product it built.	X			<ol style="list-style-type: none"> 1. Successful evaluations result in DOE issuing final occupancy certificate. 2. Final sign-off on application is executed and retainage is released.
d. Evaluations are used to make changes, if necessary, to the district's construction planning process for facilities to be built in the future.	X			Any necessary changes in future construction planning are made as the result of meetings, discussions, program changes and DOE directives.
e. The district can identify improvements made to its construction planning process based on its analysis of maintenance and operations costs.	X			Improvements documented by Maintenance and Facilities Construction departments, which constantly monitor equipment repair costs, age (vs. life cycle) of equipment, and feasibility of repairing equipment in view of parts availability, remaining life expectancy, etc.
f. Is there other information that demonstrates the district's use of this best practice that should be considered?				
23. The district has established and implemented accountability mechanisms to ensure the performance, efficiency and effectiveness of the construction program.				

⁴⁰ The evaluation should include educational adequacy, function, safety, efficiency, and improvements for future facilities.

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a. The district has clearly stated goals and measurable objectives for the program that reflect the intent (purpose) of the program and address the major aspects of the program's purpose and expenditures.		X		Although District has established ways of work, lines of responsibility and authority -- as well as mechanisms to promote cost-efficiency and protect taxpayers -- more standardization, documentation and written procedures will improve record-keeping, validate decision-making, and provide an extra layer of accountability and transparency.
b. The district uses appropriate performance and cost-efficiency measures and interpretive benchmarks, including comparisons to adjoining districts, to evaluate the program and uses these in management decision-making.		X		District is in the process of developing construction manual that will be incorporated as a procedure when completed.
c. The district has established and implemented strategies to continually assess the reliability of program performance and cost data.		X		See previous response (23.b.).
d. The district has taken advantage of significant opportunities to improve construction operations management, increase efficiency and effectiveness, and reduce costs.		X		See previous responses.
e. Is there other information that demonstrates the district's use of this best practice that should be considered?				
24. The district regularly evaluates facilities construction operations based on established benchmarks and implements improvements to maximize efficiency and effectiveness.				
a. The district assesses its facilities construction operations as a whole at least annually using performance data and its established benchmarks.		X		Although District has established ways of work, lines of responsibility and authority -- as well as mechanisms to promote cost-efficiency and protect taxpayers -- more standardization, documentation and written procedures will improve record-keeping, validate decision-making, and provide an extra layer of accountability and transparency.
b. The district reports its progress towards meeting its goals, objectives and benchmarks to the board and the public on an annual basis.		X		
c. The district has established and implemented strategies based on the outcomes of these recommendations.		X		
d. Is there other information that demonstrates the district's use of this best practice that should be considered?				

PROJECT CHECKLIST		
(Project Coordinator responsible for maintaining checklist & saving items in Project File)		
PROJECT:		
PROJECT NUMBER:		
ARCHITECT/ENGINEER:		
CONTRACTOR:		
PROJECT COORDINATOR:		
TASK ASSIGNED TO:	COMPLETED OR NOT REQUIRED	INITIALS
Survey Recommendation		
Project in EFP/Capital Outlay Plan		
Timeline Established		
Delivery Method selected		
Facility List and Scope of Work		
District cost estimate complete		
Funding for Project is Available		
Educational Specifications on hand		
Advertisement for Architectural Services (3 Times)		
Short List Architect Firms		
Interviews with Architect Firms		
Use Continuing Service A/E		
Appoint Architect (Board Agenda Item)		
Prepare Architect Agreement		
Purchase Order Written for Architect		
Use Continuing Service CM		
Advertisement for Construction Manager (3 Times)		
Short List CM Firms		
Interview CM Firms		
Appoint CM Firm (Board Agenda Item)		
Submit Project Implementation Form (OEF 110A) to DOE		
Schematic Plans Review- Maint, IS, School		
Permits Required:		
Preliminary Plans to Code Enforcement Department for Review		
Preliminary Plans Review - Maint, IS, School		
Final Plans to Code Enforcement Department for Review (NLT 30 days prior to Board Meeting)		
Final Plans (Board Agenda Item)		

Submit Letter of Transmittal w/Space Chart		
OEF 208/208a to DOE		
Advertise for Contractor (3 Times)(For bid project)		
Receive Bid Tab from Architect		
Bid Opening (Complete Bid Checklist After Opening)		
Receive & Verify Subcontractors Licenses		
Prepare Contract		
Contract Award (Board Agenda Item)		
Notice of Award to Contractor (Attach Contract)		
Verify Cert. of Insurance & Bonds		
Preconstruction Meeting Scheduled - Notices Sent		
Application for Building Permit		
Purchase Order Written for Contractor		
Preconstruction Meeting		
Advertise for Subcontractor(s)		
Subcontractor Proposals		
Notice to Proceed to Contractor		
Change Orders (Board Agenda Item)		
Change Order Acceptance to Contractor Letter		
Change Order Fee Adjustment to Architect Letter		
Substantial Inspection Form		
Substantial Completion Certificate (Board Agenda Item)		
Certificate of Occupancy (OEF 110B) to DOE		
Warranty Letter to Maintenance and Principal		
Final Completion Checklist		
Final Completion Certificate (Board Agenda Item)		
Occupancy Inspection Certification		
Certificate of Final Inspection (OEF 209)		
Closeout Documents Received/Reviewed by Project Manager		
1) As Builts		
2) Warranties		
3) Manuals		
4) Certifications		
5)		

(Sample Architect/Engineer Contract is in the process
of being revised.)

(Sample Contractor Contract is in the process
of being revised.)

Return completed form as needed to:
Office of Educational Facilities
 325 West Gaines Street, Room 1054
 Tallahassee, Florida 32399-0400
 (850) 245-0494
 Fax (850) 245-9236 or (850) 245-9304

FLORIDA DEPARTMENT OF EDUCATION
 Office of Educational Facilities

OEF USE ONLY

OEFIS # _____

**PROJECT IMPLEMENTATION
 INFORMATION**

INSTRUCTIONS: Submit one copy of the completed form for each project over \$300,000 when information is available prior to construction. Complete each item, if applicable. Reproduce this form in sufficient quantity for your use.

RE: _____ (School District Florida College)
 _____ (School Name Campus)
 _____ Name of Project

1. Brief description of proposed work: _____

2. Budget: \$ _____ 3. Student Stations (Additional): _____ 4. Square Feet: _____

As Applicable:

5. Architect:	_____	_____	_____
	Firm Name (Type or Print)	License #	Expiration Date
	_____	_____	_____
	Name of Architect (Type or Print)	License #	Expiration Date
6a. Engineer:	_____	_____	_____
	Firm Name (Type or Print)	License #	Expiration Date
6b. Engineer:	_____	_____	_____
	Firm Name (Type or Print)	License #	Expiration Date
6c. Engineer:	_____	_____	_____
	Firm Name (Type or Print)	License #	Expiration Date

Mechanical Engineer	Electrical Engineer	Civil Engineer	Structural Engineer
_____	_____	_____	_____
Name	Name	Name	Name
_____	_____	_____	_____
License #	License #	License #	License #
_____	_____	_____	_____
Expiration Date	Expiration Date	Expiration Date	Expiration Date

As Applicable:

7. Construction Management: _____ 8. Program Management: _____
 9. Design/Build Firm: _____ 10. Other (specify): _____

11. Plan Review Entity: Department of Education

Architect	Mechanical Engineer	Electrical Engineer	Civil/Structural Engineer
_____	_____	_____	_____
Name	Name	Name	Name
_____	_____	_____	_____
License #	License #	License #	License #
_____	_____	_____	_____
Expiration Date	Expiration Date	Expiration Date	Expiration Date

12. Building Official: _____
 Name (Type or Print) _____ Expiration Date _____
 Building Official License Number _____

Return completed form as needed to:
 Office of Educational Facilities
 325 West Gaines Street, Room 1054
 Tallahassee, Florida 32399-0400
 (850) 245-0494
 Fax (850) 245-9236 or (850) 245-9304

FLORIDA DEPARTMENT OF EDUCATION
 Office of Educational Facilities
CERTIFICATE OF OCCUPANCY

OEF USE ONLY

INSTRUCTIONS: Submit one copy of the completed form for each project over \$300,000. Reproduce this form in sufficient quantity for your use.

RE: _____ (School District Florida College)
 _____ (School Name Campus)
 _____ Description of Project
 _____ EFIS Number (if applicable)

In accordance with Section 1013.37(2)(c), Florida Statutes, and upon recommendation of the project architect/engineer and the certified inspector, as stated below, the subject project is ready for occupancy.

Signature: _____ Date: _____
 Superintendent President Designee

Intended Occupancy Date: _____

PROJECT ARCHITECT/ENGINEER AND CERTIFIED INSPECTOR I have inspected the subject project and, to the best of my knowledge and ability, I have determined that the safety systems* and the facility are in compliance with statutes, rules, and codes affecting the health and safety of its occupants; and that no asbestos-containing materials were specified for use in this building, nor to the best of my knowledge were asbestos containing materials used in the construction of this project.

Architect or Engineer of Record:

High Performance Green Building Standard Used [S. 255.2575(2), F.S.] _____ Rating Achieved _____

Name (Type or Print) _____ License # _____ Expiration Date _____

Signature: _____
 Architect Engineer

Building Official:

Name (Type or Print) _____ License # _____ Expiration Date _____

Signature: _____

Contractor:

Name (Type or Print) _____ License # _____ Expiration Date _____

Threshold Inspector (if applicable):

Name (Type or Print) _____ License # _____ Expiration Date _____

Project Information

As-built lowest floor elevation (for new construction) _____

Code/Edition _____ Occupancy Type(s) _____ Construction Type(s) _____ Occupant Lo _____

Automatic Sprinkler System Required ___Y___N District/Florida College Permit Number _____

Special _____ Permit _____ Stipulations _____

*Safety systems include, but are not limited to: exiting; safety; rescue; fire rating; fire protection; means of egress; master valves; eye wash and dousing shower in science labs; emergency disconnects in shops; fume and dust collection systems; heat and smoke detectors, stage protection including curtain operation, smoke vent, sprinklers, etc.; kitchen hood; fire sprinklers; smoke venting; illumination of means of egress; emergency lighting; emergency power; exit lights; fire alarm systems with required incidental functions; fire extinguishers; fuel fired heaters; electrical illumination; electrical system required ventilation; toilet facilities; kitchen hot water supply; water supply; and sewage disposal as they apply to this project.

**FLORIDA DEPARTMENT OF EDUCATION
Office of Educational Facilities
LETTER OF TRANSMITTAL**

TO: Office of Educational Facilities (OEF) 325 West Gaines Street, Room 1054 Tallahassee, Florida 32399-0400 (850) 245-0494, Fax (850) 245-9236 or (850) 245-9304	OEF USE ONLY
INSTRUCTIONS: Submit one copy of the form with project transmitted. Mark the appropriate term within the parentheses. COMPLETE EACH ITEM 1. - 18. Reproduce this form in sufficient quantity for your use.	

_____ OEF Assigned Project Number

RE: _____ (School District Florida College)

_____ School Name Campus)

_____ (School College) Code Number

New Plant Remodeling Addition
 Renovation Others (Description) _____ Description of Project

(Attached Under separate cover) is one set of signed and sealed documents for construction that (exceeds is less than) \$300,000 in construction cost, for the above-referenced facility. The information required by Chapter 1013, F.S.; SBE Rule 6A-2.0010, FAC; and SREF for the review of this project is provided as follows:

1. Submittal includes: <input type="checkbox"/> Construction Documents SREF 4.3(8)(a), (b) & (c) <input type="checkbox"/> Addendum SREF 4.3(8)(c)11. <input type="checkbox"/> Facilities Space Chart (OEF 208A) <input type="checkbox"/> Project Implementation Form (OEF 110A) <input type="checkbox"/> Other(s)	2. <input type="checkbox"/> Reuse of construction documents SREF 4.3(9). State first project name: _____ OEF original project approval date: _____												
3. Scheduled bid date (when known): _____	4. Type of facility and brief description of project: _____ _____ _____												
5. Grade Levels – Size/grouping planned student stations of this project. <table style="width:100%; border: none;"> <tr> <td style="width:15%;">Grade</td> <td style="width:15%;"># of Student</td> <td style="width:70%;"></td> </tr> <tr> <td>Level _____</td> <td>Stations _____</td> <td><input type="checkbox"/> N/A</td> </tr> </table>	Grade	# of Student		Level _____	Stations _____	<input type="checkbox"/> N/A	6. (<input type="checkbox"/> Architect's <input type="checkbox"/> Engineer's <input type="checkbox"/> Construction Manager's) estimate of : Total Construction Project Costs: \$ _____ Gross Sq. Ft. _____ Cost per Sq. Ft. \$ _____ Cost per Student Station: \$ _____						
Grade	# of Student												
Level _____	Stations _____	<input type="checkbox"/> N/A											
7. Site for new plant approved by Board <input type="checkbox"/> Yes, date: _____ <input type="checkbox"/> No <input type="checkbox"/> N/A Site (<input type="checkbox"/> New <input type="checkbox"/> Existing) Contains _____ Acres	8. Board has approved educational or ancillary facility specs. For this project: <input type="checkbox"/> Yes, date: _____ <input type="checkbox"/> No <input type="checkbox"/> N/A												
9. Project is survey-recommended: <input type="checkbox"/> Yes <input type="checkbox"/> No Date of survey: _____													
10. Architect/Engineer - Name: _____ Address: _____ Date of Contract: _____ Telephone: (____) _____ FAX: (____) _____ E-Mail: _____ Do you want the review letter sent electronically? ___ Yes ___ No													
11. Life Cycle Cost (Form OEF LCCA-1, 2, & 3) and Energy Efficiency Analysis Data sheets submitted S. 1013.37(1)(e), F.S. <table style="width:100%; border: none;"> <tr> <td style="width:30%;">Life Cycle Cost Analysis</td> <td style="width:10%;"><input type="checkbox"/></td> <td style="width:10%;">Yes</td> <td style="width:10%;"><input type="checkbox"/> No</td> <td style="width:10%;"><input type="checkbox"/> N/A</td> <td style="width:30%;">If "No," explain _____</td> </tr> <tr> <td>Energy Efficiency Analysis</td> <td><input type="checkbox"/></td> <td>Yes</td> <td><input type="checkbox"/> No</td> <td><input type="checkbox"/> N/A</td> <td>If "No," explain _____</td> </tr> </table>		Life Cycle Cost Analysis	<input type="checkbox"/>	Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	If "No," explain _____	Energy Efficiency Analysis	<input type="checkbox"/>	Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	If "No," explain _____
Life Cycle Cost Analysis	<input type="checkbox"/>	Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	If "No," explain _____								
Energy Efficiency Analysis	<input type="checkbox"/>	Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	If "No," explain _____								
12. This project includes a threshold building? <input type="checkbox"/> Yes <input type="checkbox"/> No	13. This project includes an Enhanced Hurricane Protection Area (EHPA) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A If "No," explain _____												

LETTER OF TRANSMITTAL

14. Source of Funds (Rule 6A-2.0010/SREF 2.1)	Amount of Funds	Survey Yes – No (See Key)	PPL Number (See Key)
<input type="checkbox"/> PECO/Sum of Digits - S. 1013.64(1), F.S.		1	NR
<input type="checkbox"/> PECO/Special Facilities Construction Account – S. 1013.64(2), F.S.		R	R
<input type="checkbox"/> PECO/Unit Allocation - S. 1013.64(3), F.S.		R	NR
<input type="checkbox"/> Florida College System Institution - S. 1013.64(4), F.S.		R	NR
<input type="checkbox"/> Cooperative Use Facilities - S. 1013.52, F.S.		R	NR
<input type="checkbox"/> Specified Legislative Allocation (Line Item)		NR	NR
<input type="checkbox"/> CO&DS Flow-Through Funds		R6	R6
<input type="checkbox"/> SBE Bond (COBI)		R	R6
<input type="checkbox"/> Classrooms for Kids – S. 1013.735, F.S.		R	NR
<input type="checkbox"/> Other State (Specify)			
<input type="checkbox"/> S. 1011.14, FS., Loan - Debt Service paid from: <input type="checkbox"/> CO&DS; <input type="checkbox"/> Local		2	3
<input type="checkbox"/> S. 1011.15, F.S., Loan - Debt Service paid from: <input type="checkbox"/> 1.5-Mill <input type="checkbox"/> Other (Specify):		5	3
<input type="checkbox"/> Local Bonds - Debt Service paid from: <input type="checkbox"/> CO&DS <input type="checkbox"/> Local		2	3
<input type="checkbox"/> Local Millage (1.5 Mill) - S. 1011.71(2), F.S.		4	NR
<input type="checkbox"/> Other local funds		NR	NR
<input type="checkbox"/> S. 1013.15(4)(a), F.S., Lease and Lease Purchase (COPs)		R	NR
<input type="checkbox"/> Other Local (Specify):			
<input type="checkbox"/> Federal (Specify): (Davis-Bacon Act Wage Rate & Federal Workers Compensation Shall Apply)			
TOTAL			

Key:

<p style="text-align: center;">R - Required</p> <ol style="list-style-type: none"> 1. Remodeling, renovation, maintenance, repair, and site improvement projects only. 2. Required if principal is paid from CO&DS or from PECO funds. 3. Required if principal is paid from CO&DS funds. 	<p style="text-align: center;">NR - Not Required</p> <ol style="list-style-type: none"> 4. Required for projects other than renovation, repair, or maintenance. 5. Depends on source of funds used to repay loan. 6. Requires approved PPL and survey recommendation.
--	--

15. S. 1013.44(1)(a), F.S., List passive design elements and low energy usage features included in the design.

16. Written agreements are on file with the following appropriate agencies:

<input type="checkbox"/> Fire/Police	<input type="checkbox"/> Utilities/Connection Fees
<input type="checkbox"/> Traffic Control Safety	<input type="checkbox"/> Local Comprehensive Plan Approval
<input type="checkbox"/> Primary Roads/Emergency Access	<input type="checkbox"/> Emergency Management

17. (PL 89-665, Federal Funds) Historical Significance. Project involves building over 50 years old.
 Yes No If "Yes," year building was constructed:

18. Please provide an e-mail address if you desire an electronic copy of the review letter:

19. Please provide a contact name and FAX telephone number if the district desires draft copies of review mandatory and comments as reviews are being completed. (Caution: Mandatories and comments may be different in the final, signed review letter.)

Contact name: _____ FAX: () _____

20. Use this space for additional information:

Signature: _____
 Superintendent, President, Designee

Date Signed: _____

RE: _____

- School District Florida College
 School Name Campus

A Facility Space Name	B SREF Design Code	C Space Number	D Net Square Footage of Space	E Design Occupant Capacity	F Net Square Footage Circulation Walls/Overhangs
1.					
2.					
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47.					
48.					
TOTAL (this page)					

RE: _____ School District Florida College
 _____ School Name Campus

	B	C	D	E	F
	SREF Design Code	Space Number	Net Square Footage of Space	Design Occupant Capacity	Net Square Footage Circulation Walls/Overhangs
1.					
2.					
3.					
4.					
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24.					
25. TOTAL (this page)					
26. Total HVAC and Electrical					
27. Total Design Capacity (all pages)					
28. Total NSF (all pages and line 26.)					
29. Total Circulation, Walls, Overhangs, etc. (Page 1, line 11)					
30. Total Gross Area (lines 28. and 29.)					

RECOMMENDED AREAS

31. Multiply Total in Line 28. by:	
a. 27% (grades K-6 allowed in line 29.)	
32 % (grades 6-9 allowed in line 29.)	
34% (grades 9-12, Vocational Center, Florida Colleges and ancillary allowed in line 29.)	
b. 6% (HVAC and electrical rooms; up to 6% allowed in line 26.)	

32. If areas in items 26. or 29. exceed allowable areas in 31.a. or b., please provide explanation*

*Justification for excessive areas must be approved by OEF.

**FLORIDA DEPARTMENT OF EDUCATION
Office of Educational Facilities**

CERTIFICATE OF FINAL INSPECTION

TO: Office of Educational Facilities (OEF) 325 West Gaines Street, Room 1054 Tallahassee, Florida 32399-0400 (850) 245-0494 Fax (850) 245-9236 or (850) 245-9304	OEF USE ONLY
INSTRUCTIONS: Submit for OEF files one copy of the completed form for all projects with construction costs exceeding \$300,000. Mark the appropriate term within the parentheses. Reproduce this form in sufficient quantity for your use. Section 1013.37(2)(c), F.S.	

RE: _____ OEF Assigned Project Number _____
 _____ (School District Florida College)
 _____ (School Name Campus)
 _____ (School College) Code Number _____
 _____ Description of Project _____

SECTION A: BOARD'S ACCEPTANCE

Upon the recommendation of our Project (<input type="checkbox"/> Architect <input type="checkbox"/> Engineer) as certified in Section B below, in accordance with Chapter 1013, F.S., THE BOARD ACCEPTED the above-referenced project on _____, _____.	
Name (Type or Print) _____	
Signature: _____ (<input type="checkbox"/> Superintendent <input type="checkbox"/> President)	Date: _____, _____.

SECTION B: (ARCHITECT ENGINEER) CERTIFICATION

As PROJECT (<input type="checkbox"/> ARCHITECT <input type="checkbox"/> ENGINEER), I have inspected this project and, in my considered professional opinion, the work required by the contract for this project has been completed in accordance with approved contract documents; Chapter 1013, Florida Statutes; Rule 6A-2.0010, FAC; Chapter 553, F.S.; and the Florida Building Code.			
Signature: _____		Date: _____, _____.	
Firm Name: _____			
Address: _____			
Street/P.O. Box	City	State	Zip

SECTION C: Building Official Other (Specify) Certification _____

I have inspected the project, and in my considered opinion, it is complete and in accordance with applicable statutes, rules, and codes.	
Name (Type or Print) _____	
Signature: _____ <input type="checkbox"/> Building Official <input type="checkbox"/> Certified Inspector	Date: _____, _____.

SECTION D: FACILITY INFORMATION.

1. TYPE OF PROJECT: <input type="checkbox"/> New Plant <input type="checkbox"/> Addition <input type="checkbox"/> Remodeling <input type="checkbox"/> Renovation <input type="checkbox"/> _____	2. CORRECTED "SPACE INVENTORY REPORT" (land, building, room) HAS BEEN FILED WITH THE OEF: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A If "No," explain: _____
3. SOURCE OF FUNDS: <input type="checkbox"/> Local <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> _____	4. ADJUSTED FINAL CONTRACT AMOUNT: \$ _____
	5. PROJECT GROSS SQUARE FOOTAGE: _____ SQ. FT.
	6. COST PER GROSS SQUARE FOOT: \$ _____
7. COST PER STUDENT STATION: \$ _____	

CERTIFICATE OF FINAL INSPECTION (CFI)

8. BUILDING CONTRACT DATE: _____ COMPLETION DATE: _____
9. CHANGE ORDERS - List of each Change Order and amount (excluding Direct Purchase amounts).
C.O. No. _____ \$ _____ C.O. No. _____ \$ _____
C.O. No. _____ \$ _____ C.O. No. _____ \$ _____
C.O. No. _____ \$ _____ C.O. No. _____ \$ _____
C.O. No. _____ \$ _____ C.O. No. _____ \$ _____
10. Date of Occupancy: _____ _____
11. Additional Information:

LCS Construction Policies

<u>Number</u>	<u>Title</u>
6320.02	Continuing Contracts
6321	Construction for Educational Facilities
6322	School Construction Bids
6323	General Construction Contract Procedures
6330	Selection of Professional Service Providers for Construction Projects
6334	Prequalification of Contractors for Educational Facilities Construction
6335	Construction Documents
6345	Change Orders to Construction Contracts
7100	Facilities Planning
7100.01	Educational Specifications and Facilities Programming
7230.01	School/Community Initiated Projects