



WESTPORT PUBLIC SCHOOLS

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To: Westport Board of Education Finance and Facilities Committee
From: Thomas Scarice, Superintendent
Date: February 21, 2021
Re: Professional Support for Facilities Projects

The Westport Board of Education has made a commitment to quality maintenance and oversight of school facilities. A comprehensive review of the necessary facilities projects was commissioned by the Board and conducted by Antinozzi Associates in 2019, providing an independent evaluation of maintenance and structural improvements needed in the school facilities. The final Antinozzi report, an audit of existing facilities with the exception of Coleytown Middle School due to the renovation project, provided the Board with a roadmap of the investments needed to appropriately maintain the school facilities.

The scope and breadth of these capital maintenance projects over a 10-year period is significant. With a present day total cost of close to \$100 million, the stakes are high. Careful management and oversight of the capital maintenance projects is warranted to ensure that costs are kept within budget, value is maximized, construction is of high quality, and schedules are kept on time. After observing the system for over six months I recommend that the Board commit to securing outside professional expertise to augment the current Facilities Department by providing facilitation and oversight of the capital maintenance plan.

The Current Facilities Structure

The Facilities Department is overseen by the Chief Financial Officer, Elio Longo. Serving under the CFO is the Director of Facilities, Ted Hunyadi, and the Supervisor of Building Operations, Craig Schmarr. Under this leadership team, a broad cadre of maintainers (licensed in a variety of trades) and custodial staff perform day-to-day functions at eight school buildings, and at the district level, to ensure that a high standard of cleanliness is upheld for our students and staff. In addition, the maintainers perform basic repairs and modifications throughout our system on an as needed basis.

The current facilities structure is well suited to provide the necessary day-to-day operational supervision and task completion that the Board and school community expects. As the Board begins to implement the recommendations of the Antinozzi report, the current facilities structure does not have the capacity to perform the necessary functions that would ensure that the capital maintenance project costs are contained, appropriate professional services are secured (i.e. architectural, engineering, environmental, etc.), and that substantial multi-million dollar capital maintenance projects are managed from pre-construction to project closeout.

Current Professional/Technical Support for Capital Maintenance Project Management/Oversight

The current facilities department has relied on periodic professional and technical support for smaller projects on a fee for service basis. This type of support is common in school districts as it provides needed expertise that may stretch beyond the capacity of the facilities department. For example, smaller capital maintenance projects, such as the removal of a retired underground heating oil tank, may require such professional services as an environmental analysis for hazardous materials, and an engineer for excavation consultation, etc. This example is rather ordinary and the planning, analysis and commissioning of a project of this nature can typically fall within the current scope of the Director of Facilities.

However, when planning and taking action on substantial capital maintenance projects, the expertise required to bring a project from design to closure requires careful facilitation and oversight that can be provided by a professional project manager whose services can be secured through a professional firm.

Owner's Project Manager (OPM)

As the Board advances to implement the recommendations of the capital maintenance report provided by Antinozzi Associates, it is critical that these projects are afforded the necessary technical supervision and oversight from project inception through closeout and audit.

This function can be served well by a professional "owner's project manager" (OPM). By securing a professional firm for this function, the Board, through the Facilities Department, would have access to a multidisciplinary team (i.e. architecture, engineering, environmental, construction, etc.) with the necessary skill sets to support the district through all phases of the capital maintenance projects. The OPM represents the client (i.e. the Board) and works collaboratively with the project team and Facilities Department, providing needed expertise and oversight, while offering objective guidance and counsel. When done well, an OPM augments the team with expertise beyond its current capacity.

The work of the OPM includes the pre-construction phase, the construction phase, and closeout/commissioning phase. Below are some examples at each phase. These examples are not exhaustive and not necessary for every capital maintenance project.

Pre-construction Phase::

- development of the scope and schedule of the work, as well as project budget
- selection of architects, engineers, construction managers and other services required to complete the project
- development of Request for Qualifications (RFQs) and Request for Proposals (RFPs)
- contractor / sub-contractor pre-qualification
- initiating state reimbursement processes (if a qualifying project)

- reporting to appropriate staff and Boards to provide information required by town boards, departments and committees.
- coordinating all activities between town departments, boards, commissions, consultants and construction managers.
- Assisting with facilitating bid openings/awarding of bids

Construction Phase:

- providing construction observation and oversight with regular written reports/photos.
- assisting with procurement of materials, testing services, and coordination of any testing
- attending all meetings related to updates regarding the project
- submitting regular project management reports to the Facilities Department, Board, and/or Building Committee
- reviewing the schedule to ensure overall timeline is met
- reviewing requisitions/invoices during construction phase
- managing and tracking all change orders and potential exposures against contingency funds with a monthly report.
- coordinating fixtures, furnishings and equipment (FF and E) reviews, bidding and procurement
- coordinating FF and E deliveries and installation with construction schedule, coordinate with town officials and fire marshal
- managing all closeout requirements with the town and state and federal agencies as required (i.e. documentation, etc.)

Closeout/Commissioning Phase:

- coordinating and managing the closeout process
- reporting any shortcomings of the project to the appropriate parties
- overseeing and performing functional testing if warranted
- ensuring all commissioning reports and closeout documentation is submitted

Recommendation

It is recommended that the Board, through the Facilities Department, secure the services of an owner's project manager (OPM) to augment the work of the Facilities Department by facilitating and overseeing the implementation of the multi-million dollar capital maintenance plan. This can be done on a project-by-project, fee for service basis, or by bundling the work through the issuance of a request for proposal (RFP). If the Board is interested in pursuing this path forward, a discussion can be held regarding a variety of approaches to funding this work.

Additional Consideration: Master Plan/School Modernization Plan

In addition to the current capital maintenance plan, a discussion is warranted regarding a long-term master plan for the district facilities, inclusive of the Antinozzi capital maintenance plan. The Antinozzi report did not include a long-term master plan for the school facilities, sometimes referred to as a "school modernization plan".

A long-term master plan for facilities typically includes in-depth recommendations and influencing factors (e.g. enrollment projections, safety/health issues, district goals, instructional vision, etc.) that illustrate how the facilities can be reimagined to support the instructional vision of the district, and the culture and climate the district aspires to foster. Future goals and objectives are articulated while the necessary spaces, where to locate them, the value they add, and the resources required to create or augment those spaces are outlined, typically with conceptual illustrations. A long-term master facilities plan considers all facets of the school district and how the facilities support that work, while prioritizing a plan based on long-term and short-term needs and goals.

If the Board pursues this course, perhaps as a component of a long-term strategic plan, then it would be appropriate for the issuance of a separate request for proposal (RFP) to secure the services of a professional firm experienced in long-term master facilities planning.