



Book	Operating Guidelines
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In view of the ever increasing number of building projects that are being offered to Fulton County School System (FCSS), a procedure has been developed that encourages such projects, yet preserves the interests of the school system in providing safe, well-planned and well-constructed facilities. This document will outline the steps required to successfully sponsor a donated building project.

Please realize that the anticipated donated project:

- I. typically exceeds Educational Specification standards and as such, the project must be funded entirely by the project sponsor from non-FCSS sources. These costs include all design and construction expenses, on-going utility costs, up keep, and maintenance and repairs of the project. Insurance for such facilities while the project is under construction is the responsibility of the outside organization as per the conditions of the lender. Given the value of donated structures is often less than the deductible on the primary school system policy, it is the outside organization's option to obtain additional coverage at their cost through Fulton County Schools. Further, neither the school, nor any agent thereof, may participate in any funding or contractual instrument that would obligate, or be construed to obligate FCSS, the school, or local funds in any way.
- II. is essentially a construction project. As such, there are certain design, safety, liability, and code related standards that must be met, as part of the planning and project review process before approval can be granted.
- III. must be designed and constructed by appropriately licensed and insured professionals at each step of the process. These steps include:
  - a. professional architectural / engineering design of the project. Normally geotechnical evaluation study under the footprint (borings) of the structure will be required.
  - b. professional construction contract administration.
  - c. proper permitting, testing and inspection as required by FCSS or local jurisdiction.
  - d. professional construction of the facility.
  - e. proper documentation of the project construction, prior to occupancy.

#### **Project Request**

The steps to successfully completing a donated building project are as follows:

1. The approval process is initiated by the submission of a Buildings and Grounds Alteration Request. The principal must complete this request form and include as much information as possible, including:
  - a. the name of the project's sponsor.
  - b. a comprehensive written description of the project concept,
  - c. a description of the project's educational program value,
  - d. sketches as needed to fully describe the location of the project on the school site,
  - e. sketches as needed to fully describe the appearance and layout of the anticipated project, and
  - f. the "Non-FCBOE Funds" box must be checked for a donated project.

A Project Sponsor must be clearly identified. The project sponsor will need to pay all costs associated with the project, work in coordination with the Principal and Facilities Services representatives, and develop the project concept and design, as required to bring the project forward.

At this stage of project development, it is very important to attach concept drawings that clearly illustrate the envisioned donated project. This will expedite review of the proposed project.

2. The completed form is sent to the Area Superintendent. The Area Superintendent reviews the project concept and signs the form, indicating his/her disposition by checking the appropriate box. The form is then forwarded to Facilities Services for concept review.
3. Facilities Services staff will review the preliminary concept and provide comments regarding the feasibility of moving forward with the donated project. In some instances, additional information or a meeting may be required before a project concept can be evaluated on its merits. Written comments and concept approval will be forwarded upon successful completion of the concept review. Please allow 30 days (depending on staff work load) for Concept Review by Facilities Services.

**Project Design:**

4. To advance through the next phase, the project Sponsor must hire and pay for the services of a licensed design professional, architect and/or engineer, as appropriate for the project, to prepare both schematic drawings and, after approval of these schematics by FCSS, final and complete design documents including construction drawings. If the project involves building additional floor area to a previously un-surveyed portion of the site, a geotechnical survey shall be performed by a design professional documenting existing soil conditions, soil borings under concrete slabs and/or footings, and recommendations for foundation design. To clarify:
  - a. local building code officials, having jurisdiction in the municipality of the project, will need to be involved in the planning process to insure local code compliance at a later stage, when a building permit needs to be acquired before construction can begin.
  - b. the project must be designed by a professional architect and/or engineer registered to perform such work in the state of Georgia.
  - c. a full set of construction quality drawings and specifications will need to be developed, including site and erosion control plans, structural, architectural, electrical, plumbing, fire protection, mechanical and utility riser diagrams.
  - d. drawings also need to detail the location of the utility sources and shall provide for separate metering. Direct installation and billing from the utility company is the preferred method of installation; however, in some cases, campus utilities architecture may prevent direct access to the utility company facilities.
  - e. all utilities serving the structure shall be installed underground.
  - f. all existing underground utilities in the vicinity of the project need to be located and confirmed on the civil site plan.
  - g. plans shall fully describe the anticipated facility in both elevation and plan views.
  - h. all drawings must display the stamp of the registered design professional.
  - i. exterior design and finishes must be compatible with, and similar to, those on the existing campus structures.
  - j. all construction materials and methods shall match or be similar to the quality standards evidenced by and maintained in new construction built by the school system.
  - k. catalog cuts shall be submitted illustrating the materials, fixtures, hardware, etc., that will be used in the construction process. Door locksets must accommodate a Best removable core cylinder, so the hardware can be placed on the FCSS master keying system for emergency access.

At this stage in the project's development, project sponsors often try to economize by avoiding the use of design professionals, experienced with school construction. This approach usually results in delays, multiple drawing revisions, and frustration for all involved. State law requires that design professionals, licensed in the State of Georgia, shall design any structure that is built on commercial property. All construction must be Type II - Non-Combustible Construction within the school building. Use of experienced, professional architects and engineers results in the most time-efficient approvals.

**Technical Review:**

5. Upon receipt of a full set of professionally prepared and stamped construction drawings, Facilities Services staff will conduct a technical review of the documents. Questions may be raised, and drawings or details may need to be revised. When the drawings are approved, the Facilities Services representatives will sign the Building Alteration Form indicating technical approval of the structure. The signed documents will be returned to the principal of the school, indicating that the structure is approved by FCSS. Note that sometimes drawings may be "approved as noted" to save time. Final drawing revisions are required in order to close-out the project, but should be completed in time for bid to

receive the best pricing possible. At this time, Project Sponsor should obtain a cost estimate for the project to include in the Memorandum of Understanding.

**Memorandum of Understanding:**

6. Upon completion of the technical review, a Memorandum of Understanding (MOU) describing the project will need to be submitted for Administrative and Board approval. Under certain circumstances, if it is decided that FCSS maintenance will perform the installation and/or maintenance on minor building alterations or equipment installation, or if the project is small enough in scope, the MOU will not be necessary. Examples of these include benches on playgrounds, adding a gate in a fence, and planting a tree. Whenever an MOU is required, Facilities Services will send a copy of the MOU and the project out for a two-week legal review to be conducted concurrently while negotiations between Facilities Services and the Project Sponsor are underway. An electronic copy of the required format will be provided to the sponsor to assist in the preparation of the document. To conserve time, the MOU can be developed while the technical review is in its final stages. The Memorandum of Understanding will clarify the following provisions:

a. **Project Scope/Cost/Time:** a brief description of the nature and purpose of the project; a summary of the project's budget; a summary bar chart of the construction & occupancy schedule.

b. **Financing:** If loans are to be used in financing, financial plan must identify the following items:

- Funding sources to be used for repayment over the life of the loan,
- Who the proposed lender will be,
- Type of loan,
- Amount of unfinanced initial funding,
- Interest rate,
- Duration of the loan,
- Amortization schedule,
- A list of existing loan obligations and their associated revenue streams.

Donated structures that are financed should typically provide a minimum of 20% down and a maximum loan duration of 5 years.

c. **Insurance** for such facilities while the project is under construction is the responsibility of the outside organization as per the conditions of the lender. Given the value of donated structures is often less than the deductible on the primary school system policy, it is the outside organization's option to obtain additional coverage at their cost through Fulton County Schools.

d. **Project Sponsors:** a list of the officers of the Project Sponsor with names and addresses; a summary of the source of funding; a statement regarding what percentage of funding for construction will be "in place" when construction begins; a list of the names of sponsors who will accept the financial responsibility of completing the project, including all initial costs and the costs of ongoing utilities and maintenance; and a statement that the project will become the property of FCSS upon installation.

e. **Project Drawings and Specifications:** a complete listing of the construction contract documents together with the name and addresses of the licensed design professionals who prepared these documents; a statement outlining the construction phase services that will be provided by the designers to administer the construction phase activities; and a statement that the Project Sponsors will construct the project in accordance with these documents - subject to revisions that are submitted to and approved by Facilities Services.

f. **Roles and Relationships:** a statement that the parties to this agreement, subject to the limitations set forth above, will undertake the following roles as set forth in AIA Form A-191 (1996 Edition), Standard Form of Agreement Between Owner and Design-Builder: Facilities Services will assign a staff member as the "Owner's Representative." The Project Sponsor will be the "Design-Builder."

g. When the MOU is completed, it must be submitted to Facilities Services for review. If revisions to the draft copy are necessary, Facilities Services will contact the project sponsor to discuss the changes.

h. When Facilities Services is satisfied with the MOU, it will need to be signed by the following:

**Requesting Approval:**

- i. The officers of the Project Sponsor organization

**Recommending Approval:**

- ii. The School Principal
- iii. The Area Superintendent
- iv. The Chief of Operations

**Approving:**

- v. The Superintendent of FCSS
- vi. The President of the Board of FCSS

i. For projects that cost less than \$100,000.00, the project is reported as a "News and Notes" information item on the next board agenda, but does not require a vote from the board members. A copy of the completed Building Alteration Form and MOU will be returned to the Chief of Operations, then the Superintendent, and

finally to the Board President for their signatures. Once approved, the documents will be returned to the Facilities Services Department. (Please note that these signatures are dependent on availability of personnel depending on the time of year.) A conditions memo will be drafted and distributed to the Area Superintendent and Principal along with the signed Building Alterations Request and MOU documents. The proposed project is approved for the bidding process. The Project Sponsor shall not make any commitments regarding execution of the project, or that would obligate him financially, before these signed documents are received from the Principal.

**Board Approval:**

7. For projects that cost \$100,000 or more, the project must receive Board approval. In order to obtain a slot on the Board agenda, the MOU must be approved by Facilities Services and ready to submit to the Board 30 days prior to the next Board Work Session. To clarify:
- a. An executive summary is drafted and submitted to Chief of Operations along with approved MOU and Building Alterations Request form.
  - b. If acceptable to the Chief of Operations, the project is then submitted to the Superintendent for inclusion on the Board Agenda at the next Board Work Session.
  - c. The project is voted on by the Board at the next Board meeting.
  - d. The project is ready for a signature from the Superintendent and Board President. Note that the Board President is only available at the next Board meeting during certain times per year.

A copy of the completed Building Alteration Form, MOU and conditions memo (drafted by Facilities Services) will be returned to the Area Superintendent and Principal, indicating that the proposed project is approved for the bidding process. The Project Sponsor shall not make any commitments regarding execution of the project, or that would obligate him financially, before these signed documents are received from the Principal.

**Bidding Process:**

8. State Law O.C.G.A. 36-91-21 states that a Competitive Bid or Competitive Proposal is mandatory for all public school construction projects of \$100,000 or more, regardless of the funding source. The competitive procurement process shall be in accordance with the FCS Contracting Department guidelines.
- a. Submit drawings and specifications to the Contracting Department.
  - b. A two-week legal review must be performed.
  - c. Duration of bid must be 30 days.
  - d. Either "Invitation for Bid" or "Request for Proposal" forms of bidding are acceptable. Sealed bid process needs to conform to strict FCS guidelines regarding advertising, and public bid opening.

**Construction:**

9. To advance to the next stage, the Project Sponsor must hire the design professional to provide contract administration and project oversight services and a general contractor or construction manager, with appropriate experience and insurances, to perform, coordinate and supervise the following:
- a. The project will need to be reviewed, permitted and inspected, as required by the local authorities having jurisdiction.
  - b. The project will need to be constructed by a contractor who is appropriately experienced in similar types of construction (a minimum of five (5) years of experience is required), licensed, bonded and insured. Certificates of insurance will need to be provided to Facilities Services before construction can begin.
  - c. All utilities will need to be located and identified by painting or flagging to avoid disturbance during construction.
  - d. Construction activities must be coordinated with the school Principal and conducted in a manner that does not impede the operation of the school.
  - e. Inspections, as required for the project need to be coordinated and performed by the inspector in conjunction with Facilities Services, and documented accordingly. There must be one punch list containing information from outside inspections and Facilities Services prior to distribution to contractor. A temporary Certificate of Occupancy shall be obtained before occupancy by persons other than construction personnel occurs. Final payment to contractor should not be paid until project is completely closed out and approved by Facilities Services.

**Project Close-out:**

10. As the project draws to a close, certain documents must be acquired and forwarded to the appropriate persons.
- a. A final Certificate of Occupancy will need to be acquired and presented to the school Principal and Facilities Services before the structure is utilized.
  - b. Three sets of "as built" drawings must be provided by the contractor and reviewed by the professional before the last payment is made to the contractor for his services. One set of drawings shall remain at the school; the other two sets shall be forwarded to Facilities Services.
  - c. Forward copies of all inspection reports to Facilities Services for inclusion in the archived project files.
  - d. A statement of the final value of the project shall be submitted to Facilities Services.

- 11. A plaque shall be placed on the structure identifying it as a facility donated by the project sponsor.
- 12. Facilities Services shall submit the facility information to FCBOE Property Control for inclusion in our financial records.

Following the above steps will result in the most expeditious review and approval of the project sponsor's request. If you have any questions regarding the donated structure approval process, please contact Joseph A. Clements, Executive Director, Facilities Services, (404) 669-8983 or [clements@fulton.k12.ga.us](mailto:clements@fulton.k12.ga.us).

Please photocopy, sign and return this form to Facilities Services indicating that you have read and understand the requirements, as outlined above, to successfully sponsor a donated structure project. Thank you.

_____	_____	_____	_____
Principal	Date	Project Sponsor	Date

EHG - Flow Chart.pdf (18 KB)