



# SUCCESSFUL PROJECTS

2018-2019 Workshop Series







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# Managing Maintenance Projects





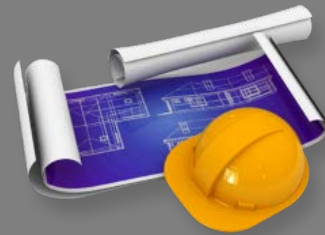


## **Do Maintenance Projects Need an Architect or DSA Approval?**

Jeff Berrios

Jared Ramirez

Melinda Pendleton



A graphic featuring a black silhouette of two hands forming a heart shape. The hands are positioned with fingers pointing outwards and thumbs pointing inwards to create the heart's outline. The background is a smooth gradient transitioning from purple at the top to orange and yellow at the bottom. The text 'DSA' is centered within the heart shape.

DSA



A graphic illustration featuring two hands, rendered in solid black, positioned to form a heart shape. The hands are positioned symmetrically, with fingers pointing towards the center. The background is a smooth gradient of colors, transitioning from a deep purple at the top to a bright yellow-orange in the center, and then to a darker orange at the bottom. The word "Architects" is written in a blue, sans-serif font, centered within the heart shape formed by the hands.

Architects

# **Maintenance / Small Projects**

- When is DSA required.
- When is DSA not required.
- DSA Certification.
- When to consult an Architect.

# Department of the State Architect (DSA)

- Field Act 1933 (CA) – after 1933 Long Beach earthquake.
  - Legislates:
    - Schools to be designed by architects & engineers.
    - Schools approved by DSA.
    - Banned unreinforced masonry buildings.
    - Schools must withstand a minimum level of lateral forces.



# DSA-Required

- Accessibility
- Fire Life Safety
- Structural

# DSA-Not Required?

- Interpretive Regulations (IRs)
  - Uniform criteria for achieving code compliance.
  - For plan review/approval and monitoring construction.
  - Updated regularly.
  - Numbered for reference.



# DSA-Not Required?

- Interpretive Regulations-IR A-10
  - “Alteration & Reconstruction Projects-DSA Approval Exemption”
  - Construction cost threshold.
  - Voluntary to submit for review.
  - Must still comply with all California Codes of Regulations.

## ALTERATION AND RECONSTRUCTION PROJECTS—DSA APPROVAL EXEMPTION

<b>Disciplines:</b>	Structural	<b>History:</b>	Revised 01-26-18	Revised 02-04-15	Revised 11-03-10
	Fire & Life Safety		Revised 06-30-16	Revised 04-30-14	Revised 07-02-09
	Access Compliance		Revised 02-12-16	Revised 05-15-13	Revised 12-08-08
				Revised 02-22-13	Revised 03-17-08
				Revised 01-24-12	Revised 05-29-07
				Revised 03-10-11	Issued 11-16-05

**PURPOSE:** The purpose of this Interpretation of Regulations (IR) is to clarify when plans and specifications for alteration or reconstruction projects governed by California Education Code Sections 17295 and 81133 are required to be submitted to the Division of the State Architect (DSA) for review and approval, and to make the annual adjustment to the construction cost thresholds cited in the California Education Code sections.

### 1. EXCEPTIONS:

- 1.1** DSA review and approval is not required for alteration or reconstruction projects to school buildings governed by the Field Act with an estimated construction cost of \$103,300, or less, for 2017 and 2018.
- 1.2** DSA review and approval is not required for alteration or reconstruction projects to school buildings governed by the Field Act with an estimated construction cost greater than \$103,300, but not in excess of \$232,425, for 2017 and 2018 when all of the following conditions are met:
  - 1.2.1** A California-registered structural engineer shall examine the project and prepare a written statement certifying that the project does not contain any work of a structural nature. The statement must attest that the work does not cause any alteration or reconstruction of structural elements nor trigger structural rehabilitation per Title 24, Part 1, Section 4-309(c). This statement shall bear the signature and stamp or seal of the structural engineer and shall be filed with the appropriate DSA regional office.
  - 1.2.2** The design professional in responsible charge of the project shall prepare a statement certifying that the plans and specifications (1) contain no work that is regulated by the accessibility standards of Title 24, (2) contain no work that triggers accessibility upgrades to existing buildings or facilities, and (3) meet all applicable fire and life safety standards. This statement shall bear the signature and stamp or seal of the design professional and shall be filed with the appropriate DSA regional office.
  - 1.2.3** Within 10 days of the project completion, a DSA-certified project inspector shall sign and submit a verified report to DSA indicating that the completed project is in conformance with the plans and specifications. Form [DSA 999](#): Inspection Verified Report for Projects Exempt from DSA Approval, is available from the DSA website at [www.dgs.ca.gov/dsa/Forms.aspx](http://www.dgs.ca.gov/dsa/Forms.aspx).



## ALTERATION AND RECONSTRUCTION PROJECTS—DSA APPROVAL EXEMPTION

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				Revised 03-10-11	Issued 11-16-05

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# DSA-Not Required?

- Interpretive Regulations-IR A-22
  - “Construction Projects & Items Exempt from DSA Review”
  - Structural & FLS
  - Accessibility



## CONSTRUCTION PROJECTS AND ITEMS EXEMPT FROM DSA REVIEW

<b>Disciplines:</b>	All Disciplines	<b>History:</b>	Revised 08-25-15	Revised in its entirety 08-14-14
			Revised 06-16-15	Revised 03-22-13
			Revised 11-24-14	Issued 08-15-08

**PURPOSE:** The purpose of this Interpretation of Regulations (IR) is to clarify when plans and specifications for small construction projects on existing public school sites are required to be submitted to the Division of the State Architect (DSA) for review, approval, and construction oversight.

### INTERPRETATION:

#### 1. CALIFORNIA BUILDING STANDARDS CODE COMPLIANCE:

- 1.1 The following **does not require DSA structural and fire and life safety approval**. However, this work shall comply with all currently effective design, construction, and inspection provisions of the California Code of Regulations (CCR), Title 24, as amended by DSA. Inspection shall be performed by a DSA certified project inspector.
  - **Maintenance work** per Section 4-315, Part 1, California Administration Code (CAC) and defined in Section 4-314 Part 1, CAC.
- 1.2 The following **do not require DSA structural and fire and life safety approval** and are exempt from the Field Act. However, this work shall comply with all currently effective design, construction, and inspection provisions of the CCR, Title 24, as adopted by the California Building Standards Commission.
  - **Structures or items not considered a school building per Section 4-314, Part 1, CAC.**
  - **Non-school structures per Section 4-310, Part 1, CAC and maintenance of those structures.**

## **CONSTRUCTION PROJECTS AND ITEMS EXEMPT FROM DSA REVIEW - Continued**

It is not mandatory to obtain DSA concurrence that a project is exempt. However, written concurrence may be requested in accordance with DSA procedure [PR 14-02](#).

**2. ACCESS COMPLIANCE REQUIREMENTS:** All projects, whether governed by the Field Act or not, shall comply with all applicable accessibility provisions of the CCR, Title 24. Some projects that are exempt from DSA structural and fire and life safety approval, including non-school structures per Section 4-310, Part 1, CAC, are required to be submitted to DSA for review and approval by the access compliance section per Government Code Sections 4450-4461. See Appendix A for project types that fall into this category.

**3. CONSTRUCTION PROJECTS AND ITEMS ELIGIBLE FOR EXEMPTION:** See Appendix A for a list of construction projects and items eligible for exemption from DSA structural safety, fire and life safety, and/or access compliance review and approval. Checkmarks in Appendix A are used to indicate whether an item is or is not eligible for exemption from review by one or more disciplines. Footnotes clarify any special conditions under which an item is or is not eligible for exemption.



## CONSTRUCTION PROJECTS AND ITEMS EXEMPT FROM DSA REVIEW

## Appendix A—Construction Projects and Items Eligible for Exemption

Project Description	Exempt from SS Review		Exempt from AC Review		Exempt from FLS Review	
	No	Yes	No	Yes	No	Yes
1. Cell or antenna towers and poles less than 35 ft. tall (lighting poles, flag poles, poles supporting open mesh fences, etc.) not in designated fire lane(s).		✓		✓ <sup>1</sup>		✓
2. Cell or antenna towers and poles greater than 35 ft. above grade not in designated fire lane(s).	✓ <sup>6</sup>			✓	✓	
3. Soil retaining walls less than four feet tall without surcharge or a sloping backfill.		✓		✓ <sup>1</sup>		✓
4. Baseball dugouts less than 250 sq.ft. of floor area with lightweight roof construction and soil retaining walls less than four feet tall without surcharge or a sloping backfill (if applicable).		✓	✓ <sup>2</sup>			✓
5. Ball walls or yard walls less than six feet above grade, not in a designated fire lane.		✓		✓ <sup>1</sup>		✓
6. Free standing signs, scrolling message signs, scoreboards, or solid clad fences of which the apex is less than eight feet above the highest adjacent grade.		✓		✓ <sup>1, 4</sup>		✓
7. Bleachers and grandstands five rows of seats or less with the first row starting at ground level.		✓	✓ <sup>2</sup>			✓

**CONSTRUCTION PROJECTS AND ITEMS EXEMPT FROM DSA REVIEW****Appendix A—Construction Projects and Items Eligible for Exemption  
- Continued**

	<b>Exempt from SS Review</b>		<b>Exempt from AC Review</b>		<b>Exempt from FLS Review</b>	
8. Ancillary accessory facilities to athletic fields (one-story, not over 250 sq.ft., used for equipment storage, toilets, snack bar, ticket booths, etc.).		✓	✓ <sup>2</sup>			✓
9. Playhouses less than 250 sq.ft. of floor area and playground equipment of any size.		✓	✓ <sup>3</sup>			✓
10. Open-mesh baseball backstops less than 35 ft. in height for cantilevered pole systems.		✓ <sup>7</sup>	✓ <sup>3</sup>			✓ <sup>7</sup>
11. Open-mesh fences less than 35 ft. in height or ornamental and security fencing with spaced rails and pickets less than eight feet in height.		✓ <sup>7</sup>		✓ <sup>4</sup>		✓ <sup>7</sup>
12. New or replacement of sidewalks.		✓	✓			✓
13. Landscaping.		✓	✓ <sup>4</sup>			✓
14. Replacement in-kind of mechanical, electrical, or plumbing units. <sup>16</sup>		✓ <sup>9</sup>		✓ <sup>13</sup>		✓ <sup>9</sup>
15. Cosmetic maintenance work such as painting, wallpapering, etc., as defined in Title 24, Part 1, Section 4-314. <sup>16</sup>		✓		✓ <sup>15</sup>		✓

**CONSTRUCTION PROJECTS AND ITEMS EXEMPT FROM DSA REVIEW****Appendix A—Construction Projects and Items Eligible for Exemption  
- Continued**

<b>Project Description</b>	<b>Exempt from SS Review</b>		<b>Exempt from AC Review</b>		<b>Exempt from FLS Review</b>	
	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>
16. Installation of synthetic (artificial turf) play fields or running tracks.		✓	✓			✓
17. Installation of new parking areas not involving fire lane(s).		✓	✓			✓
18. Installation of new surfacing over existing parking areas (such as asphalt overlays).		✓	✓ <sup>5</sup>			✓
19. Removal and replacement of existing parking area surfacing. <sup>16</sup>		✓	✓ <sup>5</sup>			✓
20. Installation of seal-coating at existing parking areas (including new striping), or normal maintenance such as restriping or the filling of potholes and cracks. <sup>16</sup>		✓		✓		✓
21. Batting cages with open-mesh sidewalls and loose netting roof: batting cages consisting of cantilever poles with loose netting sidewalls and roofs.		✓	✓ <sup>3</sup>			✓
22. Reroofing with in-kind roof or replacing with light-weight, non-metal, non-tile roof, and insulation system. <sup>16</sup>		✓ <sup>10</sup>		✓ <sup>11</sup>		✓



**CONSTRUCTION PROJECTS AND ITEMS EXEMPT FROM DSA REVIEW**

**Appendix A–Construction Projects and Items Eligible for Exemption**  
**- Continued**

	Exempt from SS Review		Exempt from AC Review		Exempt from FLS Review	
23. Weatherization/caulking. <sup>16</sup>		✓		✓ <sup>11</sup>		✓
24. Window replacement (glazing only—not rated or requiring frame replacement). <sup>16</sup>		✓		✓ <sup>11</sup>		✓
25. Window shading devices—window screens (applied to glazing only), and solar shading devices requiring no structural attachment. <sup>16</sup>		✓		✓ <sup>11</sup>		✓
26. Energy Management Systems.		✓		✓ <sup>13</sup>		✓
27. Lighting upgrade: re-lamping, ballast replacement, fixture replacement. <sup>16</sup>		✓		✓ <sup>13</sup>		✓
28. Water-heating upgrades, not including solar thermal installations on roofs. <sup>16</sup>		✓		✓ <sup>13</sup>		✓
29. Solar tubes or small skylight installations for which no structural framing member is altered or penetrations of fire rated assemblies.		✓ <sup>14</sup>	✓ <sup>12</sup>			✓
30. Fire alarm systems: Includes new systems and replacements or alterations to existing systems.		✓		✓	✓ <sup>8</sup>	

# DSA-Not Required?

- Procedure: Exempt Concurrence PR 14-02
  - Obtain written concurrence of exempt project.
  - Exemption from Accessibility, Fire Life Safety, Structural .
  - Not mandatory, Good check and written record.
  - DSA Form (DSA 7) + fee.
  - Over the counter review; Exempt or Not Exempt.

## PROCEDURE: EXEMPT CONCURRENCE

1. **EXEMPTION DEFINED:** When a project is found to be exempt from DSA review and approval, it can be constructed without an approval from DSA. However, the project must be fully compliant with all applicable portions of the California Code of Regulations, Title 24. In authorizing and completing the design and construction of exempt projects, the school board assumes the responsibility for employing appropriately licensed architects or engineers to prepare the plans and specification, and assumes the responsibility for employing DSA certified inspectors to provide for the adequate inspection of materials and work of construction.
2. **TYPES OF EXEMPTIONS:** DSA reviews and approves plans for code compliance in three main areas, Structural Safety, Fire & Life Safety, and Accessibility. It is possible for a project to be exempt from DSA review and approval in any or all of these areas.
  - 2.1 **Exemption from DSA review and approval for Structural Safety and Fire & Life Safety:** Types of exempt projects in this category can be found in DSA IR A-10, IR A-22, and in Appendix A of this document.
  - 2.2 **Exemption from DSA review and approval for Accessibility:** Types of exempt projects in this category can be found in DSA IR A-10 and IR A-22. In addition, types of scope that can trigger the requirement for accessibility upgrades (along with the need to submit the project to DSA) are found in Appendix A of this document.
3. **PROCESS TO OBTAIN DSA CONCURRENCE IF THE PROJECT IS EXEMPT FROM DSA REVIEW AND APPROVAL:** It is not mandatory to obtain DSA concurrence that a project is exempt. However, some clients desire to have written concurrence from DSA. In those cases, the following process is provided:
  - The applicant needs to complete form DSA 7 (replaced form DSA 39-1) and contact the appropriate DSA regional office to determine the best method to submit the form. DSA contact information is available at the following link:  
[www.dgs.ca.gov/dsa/AboutUs/contact.aspx](http://www.dgs.ca.gov/dsa/AboutUs/contact.aspx)





# PR 13-02

## PROCEDURE: PROJECT CERTIFICATION PROCESS

**PURPOSE:** California Code of Regulations (CCR), Title 24, Part 1, Chapter 4, Article 1 (Sections 4-211 through 4-220) and Group 1, Articles 5 and 6 (Sections 4-331 through 4-344) provide regulations governing the construction process for projects under the jurisdiction of the Division of the State Architect (DSA).

This Procedure provides a required, prescribed method for compliance with applicable sections of the above regulations related to certification of construction projects.

**BACKGROUND:** Constructed projects regulated by DSA are required to be certified as to the safety of design and construction pursuant to Education Code Sections 17280-17316 and 81130-81147.

Ensuring projects are certified is critical because:

- Certification provides a method to report the safety of school construction.
- School board members may be personally liable for projects until certified.
- DSA will be unable to approve new proposed projects associated with uncertified construction (see DSA IR A-20 for in-depth discussion).

## **NEW PROJECTS ASSOCIATED WITH EXISTING UNCERTIFIED PROJECTS**

### **References:**

California Code of Regulations (CCR) Title 24

Part 1: California Administrative Code, Section 4-339

California Education Code, Sections 17280-17316 and 81130-81147

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**Disciplines:** All**History:**

Revised 10-15-13

Revised 03-22-13

Revised 08-06-09

Issued 04-15-08

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This administrative interpretation of regulations (IR) is intended for use by the Division of the State Architect (DSA) staff, and as a resource for design professionals, to promote more uniform statewide criteria for plan review and construction inspection of projects within the jurisdiction of DSA which includes State of California public elementary and secondary schools (grades K-12 and community colleges), and state-owned or state-leased essential services buildings. This IR indicates acceptable practices as stipulated in the California Administrative code (CCR, Title 24, Part 1) and aligning with DSA policies and procedures.

This IR is reviewed on a regular basis and is subject to revision at any time. Please check the DSA website for currently effective IRs. Administrative and technical IRs are listed on the DSA website at:

<http://www.dgs.ca.gov/dsa/Resources/IRManual.aspx>

Administrative IRs are effective upon publication. Questions regarding the effect for existing projects can be directed to the DSA Regional Office with plan review and construction oversight authority for the project.

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**Purpose:** This Interpretation of Regulations (IR) clarifies the Division of the State Architect (DSA) **review and approval of projects associated with uncertified school buildings.**

**Background:** A certification of compliance is issued by DSA for a public school building project when the work of construction has been completed in accordance with the requirements of the Field Act, Education Code Sections 17280-17316 and Sections 81130-81147. Any building project that has not received a certification of compliance in accordance with Section 4-339, Part 1, Title 24, California Code of Regulations is considered "uncertified."

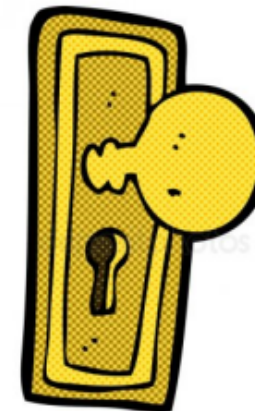
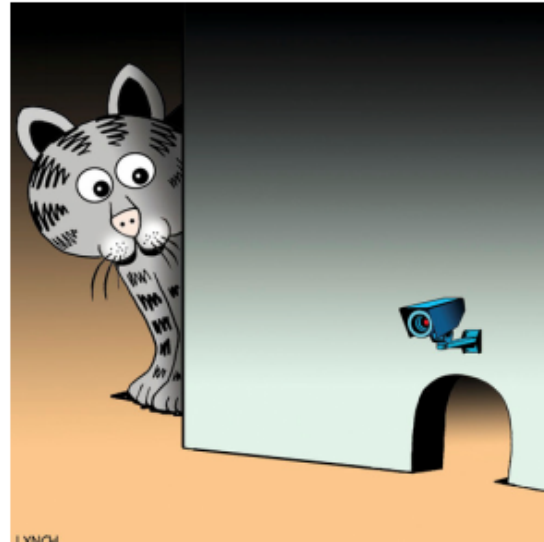
**Policy:** **New work involving uncertified projects cannot be approved by the DSA until the issue of certification is resolved. The DSA will not approve (stampout) plans and specifications for alteration and/or addition projects on, or utilizing portions of uncertified projects, except when the new project is solely for the purpose of upgrading fire-life safety (FLS), and/or security aspects of the building/campus as indicated below.**

## 1. **EXCEPTIONS:**

**1.1 Scope:** The scope of projects accepted for DSA approval under this policy shall be limited to FLS and security alteration projects of the following types:

- Campus or system-wide fire alarm upgrade.
- Upgrade or replacement of the uncertified building's fire alarm system.
- Security cameras and related wiring and equipment installation or upgrade.
- Security hardware (door lockset) upgrade.

**1.2 Implementation:** DSA will review and approve these alteration projects on uncertified buildings as described in Section 1.1 above, provided the school district submits a letter to the DSA, signed by the school district Superintendent, stating that the school district is actively seeking certification of all uncertified projects within the district, including a timeline.





## 1. **DSA CONSTRUCTION OVERSIGHT PROCESS OUTLINE:**

### **General**

DSA provides oversight during construction by providing supervision of the Project Inspector, reviewing administrative and technical documents, communicating with involved parties and by making periodic visits to the construction site. The general outline of the process is as follows:

#### 1.1 **Approval of the Project Inspector:**

- The project inspector must be approved by DSA for each individual project. This requires a form DSA 5-PI (Inspector Qualification form) to be submitted to DSA.
- The DSA Field Engineer (DSE) approves the project inspector (or disapproves and a new form DSA 5-PI needs to be submitted).
- See DSA procedure [PR 13-01](#) for further discussion.

#### 1.2 **Notice of Start of Construction/Request for Inspection Cards:**

- The Design Professional in Responsible Charge or the district (owner) submits form DSA 102-IC (Notice of Start of Construction/Request for Inspection Card) to DSA.
- See DSA procedure PR 13-01 for further discussion.

#### 1.3 **DSA Creates Box (Electronic communication/collaboration system):**

- DSAbbox.com is a web-based file sharing system used by those involved in the

1.6

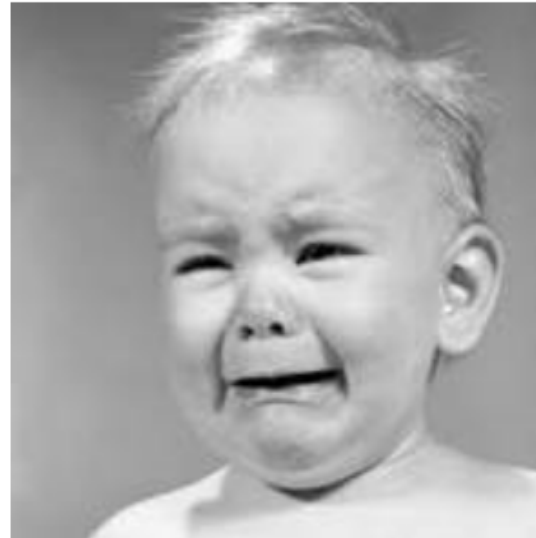
### Project Certification Phase is Initiated:

- See Section 2 for in-depth discussion about the process of Project Certification.
- When a project becomes occupied, in use, or otherwise complete, DSA initiates the project certification phase. The project either becomes “certified” or “not certified.”
- The Design Professional in General Responsible Charge and the district (owner) are notified of the certification status of the project.
- If the project is certified, DSA creates a certification letter which is uploaded to the DSAbbox and sent to the school district (owner) and the Design Professional in General Responsible Charge.

THE DSA CLOCK STARTS TICKING....



- If the project is not certified, then:
  - DSA completes form DSA 301-N “Notification of Requirement for Certification” which identifies the reasons certification is being withheld. The form is uploaded to the DSAbbox, and sent to the district (owner). If the reasons for withholding certification are not resolved within 60 calendar days, form 301-N is updated by using form 301-P and the form 301-P is then posted on the DSA website using the DSA Certification Box.
  - After DSA posts a form DSA 301-P, the district and its design team can upload the identified required documentation to the DSA Certification Box and/or upload forms DSA 302 with responses to the issues identified in the form DSA 301-P.
  - After the district and its design team has resolved all the issues identified in the form DSA 301-P, a request for DSA to re-examine the file must be made by submitting a completed form DSA 302.
  - A fee may be required to initiate the re-examination process as specified in section 2.9.





## PROJECT CERTIFICATION PROCESS

**APPLICABLE DSA FORMS:** The following forms are referenced in this document and can be found on the DSA website at <http://www.dgs.ca.gov/dsa/Forms.aspx>.

- DSA 1            Application for Approval of Plans and Specifications
- DSA 5-PI       Project/Special Inspector Qualification Record
- DSA 6-AE       Architect/Engineer Verified Report
- DSA 6-C       Contractor Verified Report
- DSA 6-PI       Project Inspector Verified Report
- DSA 102-IC     Construction Start Notice/Inspection Card Request
- DSA 103       Statement of Structural Tests and Special Inspections
- DSA 130       Certificate of Compliance – Approved Bleacher/Grandstand Fabricator
- DSA 152       Project Inspection Card
- DSA 154       Notice of Deviations/Resolution of Deviations
- DSA 155       Project Inspector Semi-Monthly Report
- DSA 291       Laboratory of Record Verified Report
- DSA 292       Special Inspection Verified Report
- DSA 293       Geotechnical Verified Report
- DSA 301-N      Notification of Requirement for Certification (first notice)
- DSA 301-P      Notification of Requirement for Certification (posted)
- DSA 302       Response to DSA 301-P Notification of Requirements for Certification



November 3, 2017

Dr. Eimear O'farrell  
Clovis Unified School District  
1450 Herndon Avenue  
Clovis, CA 93611

**Project:** Ronald Reagan Elementary(Clovis Unified School District)  
**Application #:** 02-115347  
**File Id #:** 10-27  
**Scope:** Alterations to 12-bldgs. A, B, C1, C2, C3, D,E, F01, F02, F03, GO1 & G08

Dear Dr. Eimear O'farrell:

The Department of General Services' records indicate that the construction of the referenced project has been completed in accordance with design documents approved by the Department, and that all the Verified Reports covering the construction have been received. Therefore, the Department of General Services Certifies as follows:

This project is in compliance with California State regulations as to the safety of design and construction of public schools, and for the accommodation of persons with disabilities.

As stated in our letter approving the plans and specifications for this project, the Department does not review design documents or construction for compliance with the electrical, mechanical, or plumbing regulations. It is the responsibility of the professional consultants named on the application to verify compliance with appropriate parts of the California Building Code, and to submit Verified Reports documenting compliance.

Sincerely,

*For*

Chester "Chel" Widom, FAIA  
State Architect  
Division of the State Architect  
CW: dp

cc: School Board  
Architect/Engineer - Jeffrey Berrios  
File



**Certification of Compliance**

## **When to consult an Architect?** Maintenance / Small projects

- When DSA approval is Required
- Any instance when the proposed project does not require DSA, but:
  - Affects local codes:
    - Fire Dept access
    - Encroachment into an existing city/county easement

# When to consult an Architect?

- Roofing / Reroofing; flashing (water intrusion prevention)
- Window replacement, caulking / flashing (water intrusion prevention)
- Flag poles / light poles / fencing less than 35 feet tall
- Lighting upgrades (appropriate for energy and aesthetics)



# When to consult an Architect?

- Assist with specifications for competitive bidding.
  - To assure language is per public contract code.
  - To assure district gets what they want.



# When to consult an Architect?

- When in doubt, consult an Architect
  - Always want to be code compliant with CBC even if DSA approval is not required
  - Many gray issues, can be clarified by an Architect

# Thank You

## Questions?





Time for  
a **BREAK**

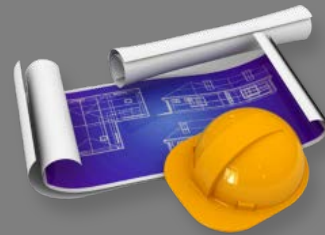






# Managing Maintenance Projects

Andy Perez



# Managing Maintenance Projects

Andy Perez  
Facilities Supervisor

# Project Planning

- ▶ Identifying The Project
  - ▶ FIT
  - ▶ Request from site
  - ▶ Facility condition spreadsheet
- ▶ Timeline
  - ▶ During/after hours
  - ▶ Days/months
  - ▶ Seasons (Summer/Spring)



# Project Planning

- ▶ Where
  - ▶ School site
  - ▶ Administrative office
- ▶ Understanding
  - ▶ Project
  - ▶ End result

# Project Planning

- ▶ Identifying Funding Source/Budget
  - ▶ School/Special
  - ▶ Maintenance
  - ▶ Routine Restricted
  - ▶ Other Sources

# CUPCCAA

- ▶ Up to \$45,000
  - ▶ No advertisement
  - ▶ Contract with a vendor
- ▶ \$45,000 to \$175,000
  - ▶ Informal bids
- ▶ \$175,000 and Beyond
  - ▶ Formal bids

# Project Planning

- ▶ Who Is Doing The Work
  - ▶ Local resources
  - ▶ Contractor
- ▶ Specifications
- ▶ Local Resources
  - ▶ Staffing expertise
  - ▶ Scheduling



# Project Planning

- ▶ Creating Timeline
  - ▶ MS Projects
  - ▶ Spreadsheet
- ▶ Contractor
  - ▶ DIR registration?
  - ▶ Trades
  - ▶ Contracts
- ▶ Standard Service Agreements

# Emergency Projects

- ▶ Reactive Projects
  - ▶ Unexpected breakdowns
  - ▶ Budget not in place for work
  - ▶ System life
  - ▶ Project planning does not exist
  - ▶ Personnel issues
  - ▶ Housing

# Maintaining Records

- ▶ Deferred Maintenance Plan
  - ▶ Maintenance Survey
    - ▶ Rating system 1 through 5
    - ▶ Location
    - ▶ System
  - ▶ Maintenance Spreadsheet
    - ▶ Site
    - ▶ Room number
    - ▶ Room section

# Maintenance Records

- ▶ Maintenance Spreadsheet
  - ▶ Each system has a tab
  - ▶ Manufacturer
  - ▶ Model number
  - ▶ Serial number
- ▶ Update
  - ▶ Spreadsheet
  - ▶ As-builts

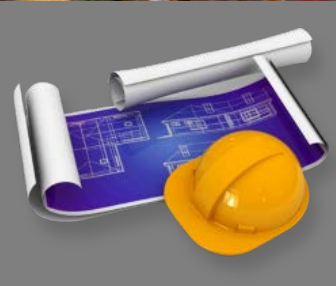
# Communications

- ▶ Effective Communication
  - ▶ Starts
  - ▶ Ends





# Roundtable

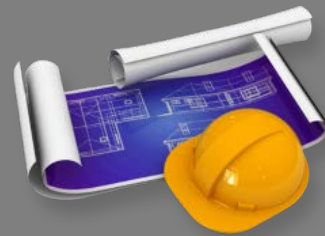






# **DSA Update**

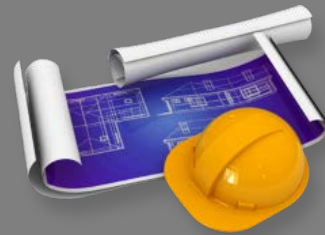
Dan Levernier





# CDE Update

John Gordon







# **C.A.S.H. Update and Q&A**

Jeff Becker





fresno county  
superintendent of schools  
Jim A. Yovino, Superintendent

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