



Project Advisory Team **HANDBOOK**



| TABLE OF CONTENTS |

Introduction	02
Roles and Responsibilities	03
PAT Schedule	05
Community Engagement	05
Capital Building Programs	06
Planning, Design, and Construction for New Schools and Renovations	07
Frequently Asked Questions	10
Glossary of Terms	13
Project Advisory Team Agreement	14

| INTRODUCTION |

Thank you for agreeing to participate on the Project Advisory Team for your school. You will be advising the Houston Independent School District on how to shape the environment of learners and your commitment of time and energy to this process will yield tremendous dividends for decades to come. This handbook will help you understand the role of the Project Advisory Team as the project moves through the design and construction process.

HISD is committed to achieving quality work that meets the district's standards of excellence as well as completing construction projects on time and within budget. The use of Project Advisory Teams has proven effective in ensuring that site-specific program needs are identified and incorporated into each project.

Project Advisory Teams (PATs) are chartered for each construction project. Teams meet monthly throughout each phase of the project, from initial planning through design, construction and finally the opening of the school. Teams generally include eight to 12 members from the school community including:

- **PRINCIPAL**
- **STUDENTS** (for middle school and high school projects)
- **TEACHERS**
- **STAFF**
- **PARENTS**
- **COMMUNITY MEMBERS**

Also included on the team are:

- **ARCHITECT**
- **HISD FACILITY PLANNING, DESIGN AND CONSTRUCTION STAFF**

Members remain with the team for the entire project (typically two to three years). While meetings should be open to your entire school community, the PAT members should be identified and serve as the core group to advise on the project.

PAT members work together to provide recommendations on planning and design, and monitor renovation and construction projects. When the project begins, the PAT will be made aware of the budget, schedule, and general scope of work set by the Board of Education. During monthly meetings, the team will review the Educational Specifications, drawings, and work schedule for the project. The PAT will work with the architect, design, and construction management staff to ensure that the project continues to meet its goals throughout the design process. The PAT will also help to organize and participate in at least three community meetings during the design process.

The team will help select colors for flooring material, paint for walls, colors and fabric for furnishings, and provide input about the exterior appearance of the building. Any problems or concerns identified by the PAT members will be brought to the attention of the HISD Project Manager during regularly scheduled PAT meetings or through emails to the principal, who will communicate with the Program Manager outside of the regularly scheduled meetings. Through coordination with the Construction and Facilities Departments, the team will participate in tours of the construction site and remain informed of the project's progress during construction.

Project Advisory Teams are essential participants in the planning, design and construction process. If a PAT member can no longer participate at the level of involvement required, it is important that he/she be replaced in order to have every voice represented.

| ROLES AND RESPONSIBILITIES |

The goal of each Project Advisory Team is to ensure that design and construction decisions fulfill the objective of providing a 21st century learning environment that supports students within the framework of the project schedule and budget. The standards that have been developed include a high degree of flexibility to support an array of educational programs, school sizes, and grade configurations. A successful school facility project requires that each team member understand and fulfill his or her responsibilities throughout each phase of the process. The team must work together to be certain that all voices are heard and respected, because each member represents a perspective that is essential for an optimal solution. The team is also responsible for ensuring regular and ongoing school community communications and engagement around the entire project.

ROLE: THE SCHOOL PRINCIPAL

RESPONSIBILITIES: The school principal is the leader of the Project Advisory Team and will be heavily relied upon to guide the meetings. He/she will identify and solicit the PAT members. Additionally, the Principal is responsible for providing input about school management issues that are specific to the educational program that will be operating in the new building. The Principal will also be asked to attend project-related community meetings and participate in reviews throughout the design process.

ROLE: THE TEACHERS

RESPONSIBILITIES: Teachers are responsible for providing feedback about classroom issues that are specific to the educational program that will be operating in the new building. Teachers will work with the Principal to communicate any updates or issues to the school community, especially other educators.

ROLE: PARENT AND COMMUNITY REPRESENTATIVES

RESPONSIBILITIES: A school is an important neighborhood feature and often serves as the center of a community. Community members, neighborhood associations and alumni groups should be active members of the planning, design and construction process and will be expected to help share progress updates with the public.

ROLE: STUDENT REPRESENTATIVE(S)

RESPONSIBILITIES: Students are asked to participate in Project Advisory Teams at both the middle school and high school levels. Student representatives provide a unique perspective on the curricular and extra-curricular needs of students, as well as perceptions about safety and security. As with other PAT members, they will be asked to share information with their colleagues.

ROLE: THE PROGRAM/PROJECT MANAGER (PM)

RESPONSIBILITIES: The responsibility of the HISD PM is to ensure that projects comply with the standards that have been established and that projects are completed on time and within budget. The HISD PM will be involved from the beginning of the project through construction completion. In addition to convening and facilitating the PAT meetings, the PM is responsible for preparing and issuing meeting minutes and coordinating community meetings.

ROLE: HISD FACILITY PLANNER (FP)

RESPONSIBILITIES: Throughout the planning and design process, the FP will work with the Principal and PAT to understand and communicate educational program requirements and how the flexibility that is inherent in the standards can meet the needs of the educational program at that site. The FP's primary responsibility is to develop the Site-specific Educational Specifications. Once they are drafted and the project moves into the design phases, the FP will review drawings during periodic briefings and at the end of the Schematic Design, Design Development and Construction Document phases of the design process. The intention of the briefings and review is to confirm what is conveyed in the diagrams and to provide input for incorporation into subsequent drafts to assure that the requirements of the Educational Specifications are addressed. The primary involvement of the HISD FP will be during the Programming, Schematic Design, and Design Development phases.

ROLE: THE HISD DESIGN MANAGER (DM)

RESPONSIBILITIES: The DM will be involved with the project and work with the FP and PAT from the Concept Development phase until the end of the project. During the Design Development phase, the DM will take responsibility for moving the design forward. The DM will review submissions during each design phase and field design questions during the construction process.

ROLE: THE DESIGN PROFESSIONAL (DP)

RESPONSIBILITIES: The Design Professional/Architect, along with his or her consultants, is responsible for developing documents that are ultimately used for the construction of the project.

ROLE: CONSTRUCTION MANAGER (CM)

RESPONSIBILITIES: The HISD CM is responsible for monitoring the work of the CMAR. They will be involved during the design phases and will advise on constructability, costs, phasing and scheduling of the construction project and will field questions during the construction phase.

ROLE: GENERAL MANAGER (GM)

RESPONSIBILITIES: The HISD GMs (Facilities Planning, Facilities Design, Facilities Construction) are responsible for managing the work of their direct reports. They will be involved throughout the planning, design and construction process and, upon recommendation of their staff, will approve submittals from the DP.

ROLE: CONSTRUCTION MANAGER AT RISK (CMAR)

RESPONSIBILITIES: The CMAR is responsible for constructing the project. They will be involved during the design phases and will advise on constructability, costs, phasing and scheduling of the construction project.

| PAT SCHEDULE |

During its meetings, the PAT will discuss the school's educational program, including issues such as grade span, class size, program organization (teaming, grade level, etc.) and the intended program capacity of the school. The Educational Specifications and Technical Standards will be reviewed, as well as an overview of the design, construction, and occupancy process and timeline. Roles and responsibilities will be discussed and clarified.

Each PAT will develop a schedule for monthly meetings, which will be posted on the school website and the district website.

| COMMUNITY ENGAGEMENT |

Since each school/community-based member of the Project Advisory Team represents an essential stakeholder group, one of the expectations for participants is that they routinely brief their constituent groups about the progress of the project and bring issues and concerns from those groups to the Project Advisory Team for resolution.

In addition to the PAT meetings, there will be at least three community meetings to discuss the project at critical milestones:



SCHEMATIC DESIGN PHASE The purpose of this meeting is for stakeholder participants to understand the project parameters, how the building relates to the site, anticipated traffic flow, building orientation, etc.



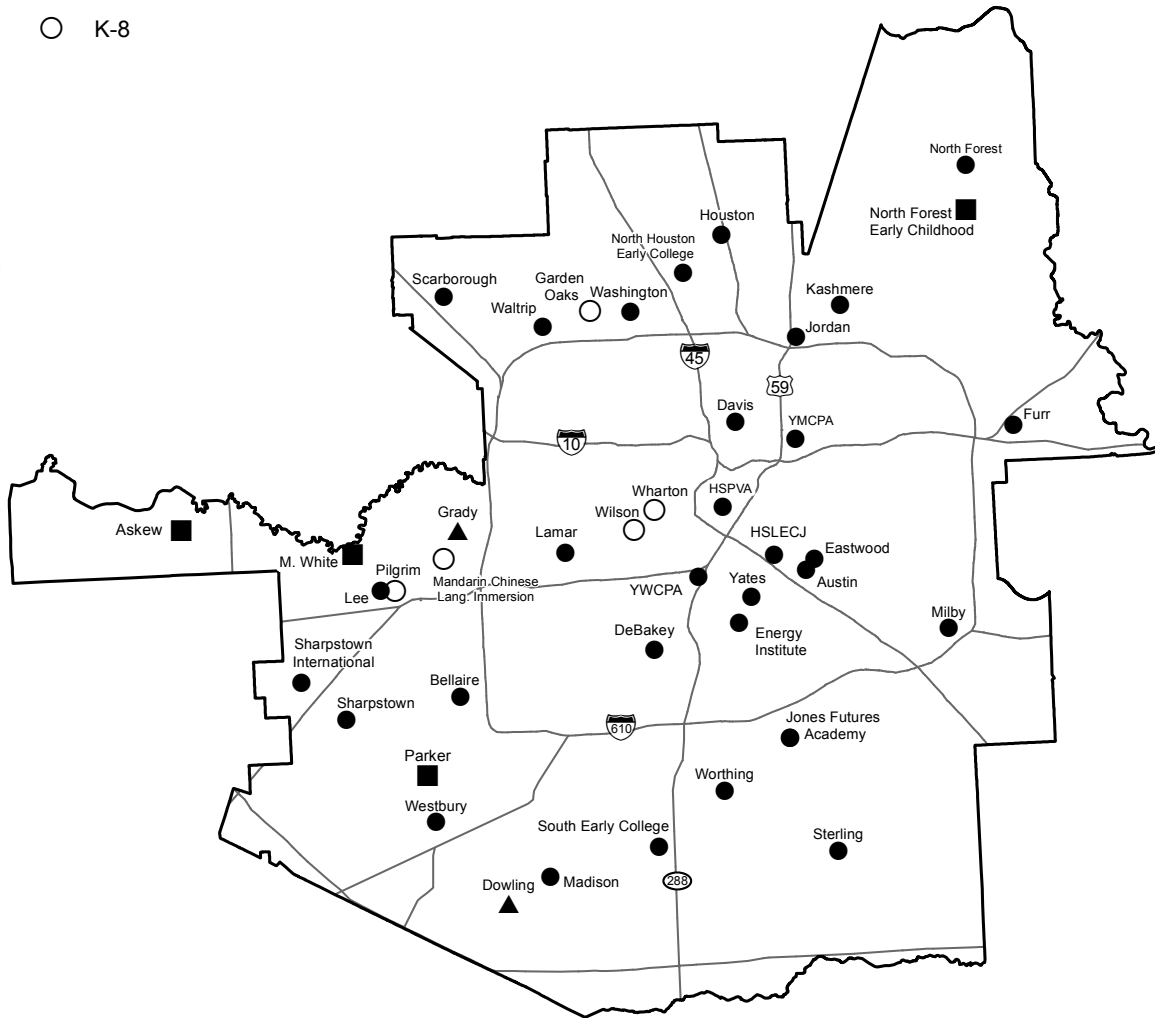
DESIGN DEVELOPMENT PHASE Participants at this meeting will receive information and provide feedback about the interior organization of the building, exterior appearance, parking, etc.



CONSTRUCTION PHASE Prior to the start of construction, the community will be invited to meet a final time. This will provide a venue to discuss the construction schedule, the plan for housing students in an alternative location (if needed), and contact information for the community should issues arise during construction.

| CAPITAL BUILDING PROGRAMS |

- HIGH
- ▲ MIDDLE
- ELEMENTARY
- K-8



| PLANNING, DESIGN, AND CONSTRUCTION FOR NEW SCHOOLS AND RENOVATIONS |

DESIGN PHASES



SITE-SPECIFIC EDUCATIONAL SPECIFICATIONS *(approximately 3-6 months)*

HISD Facilities Planning staff will work with the school staff and PAT to determine unique program requirements that must be considered. The districtwide Educational Specifications will be adapted for the specific needs of the campus. Site-specific Educational Specifications detail the number of rooms required, the size of each room, how those rooms should relate to each other (adjacencies) and the elements (sinks, electrical outlets, marker boards, cabinets, etc.) that should be included in each room.



CONCEPT DEVELOPMENT PHASE *(approximately 1 month)*

During Concept Development, the Design Professional develops drawings that illustrate the way the building may be located on the site, desired room adjacencies and configurations. Also confirmed is that the program for the project can be built within budget. This process starts with the Design Charrette. This is a one or two day collaborative work session involving the PAT, DP, and HISD staff. This collaboration allows the sharing of ideas as the initial design concept is developed and provides positive momentum into the design phases.



SCHEMATIC DESIGN PHASE *(approximately 3-5 months)*

The schematic design submittal submission will include site plans, floor plans (simple scale drawings that show room sizes, spatial relationships, column locations, doors, and windows), simple building cross sections, a table comparing required square footages from the Educational Specifications with actual square footages shown on the drawings, a preliminary estimate of cost, and 3-dimensional depictions of the building exterior. The PAT will be involved throughout the SD phase and will receive regular updates on the evolution of the design from the DP.



DESIGN DEVELOPMENT PHASE *(approximately 4-8 months)*

During Design Development, schematic design drawings are further developed to include more detail, such as a detailed site plan; room layouts; door window types; interior and exterior elevations, reflected ceiling plans; plumbing, mechanical, structural, and electrical drawings; kitchen layouts, etc. The PAT will be involved throughout the DD phase and will receive regular updates on the evolution of the design from the DP. Additionally, they will be requested to review and advise on specific requirements for the programs offered at their school. Also, interior finish options will be offered by the DP for review and selection by the PAT.



CONSTRUCTION DOCUMENTS PHASE *(approximately 6-12 months)*

Construction documents are extremely detailed drawings and specifications describing all the details required to construct the building. The reviews with the PAT at this phase will focus on details, such as electrical outlets and sinks, to ensure that the documents are consistent with the school's use.



PERMITTING AND PROCUREMENT *(approximately 3-4 months)*

Prior to construction, permits have to be obtained and sub-contractors must be selected. The PAT will be kept updated on the progress of these efforts throughout this phase.



CONSTRUCTION PHASE *(approximately 12-24 months)*

After Construction Documents are complete, the construction trades begin to work. Once the construction is underway, the PAT continues to meet monthly to discuss progress, identify community concerns, etc. Site visits may be made when the project nears completion.



FURNITURE, FIXTURES & EQUIPMENT PROCUREMENT *(approximately 8-12 months)*

Once Construction Documents are complete, HISD's FF&E Coordinator will work with the PAT and DP, to identify and will then procure appropriate furniture and equipment for the new facility.



MOVE IN *(approximately 2-3 months)*

The HISD Logistics Coordinator will work with school staff to move contents and furniture into the new building.

SEE GRAPHIC TIMELINE ON PAGE 9.

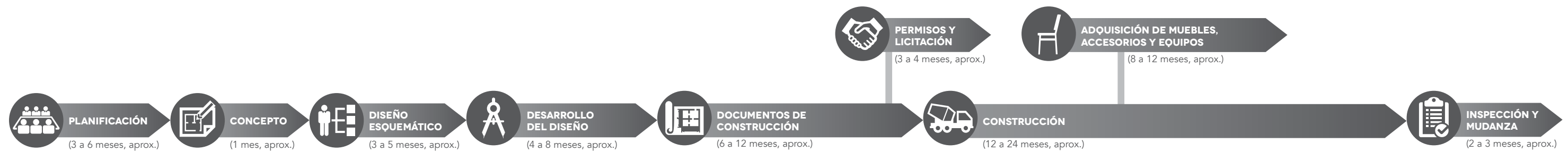
PLANNING, DESIGN, AND CONSTRUCTION FOR NEW SCHOOLS AND RENOVATIONS

TIMELINE



PLANIFICACIÓN, DISEÑO Y CONSTRUCCIÓN DE NUEVAS ESCUELAS Y REMODELACIONES

CRONOGRAMA



| FREQUENTLY ASKED QUESTIONS |

PROGRAM DESIGN ISSUES:

Q: WHAT IS MEANT BY THE “PROGRAM CAPACITY” OF THE BUILDING? HOW CAN I BE SURE THAT MY PROGRAM WILL FIT IN THE BUILDING?

A: The program capacity of a school building is the average number of students that can be accommodated with consideration for the educational program delivery model. A sample calculation for a K-Grade 5 school would be:

Kindergarten - Grade 5	# Teaching Stations	# Students/Teaching Station	Building Capacity
Kindergarten	5	22	110
Grade 1 Classroom	5	22	110
Grades 2-5 Classrooms	23	22	506
Special Populations Classroom	2	12	24
Total	35		750

In addition to the grade level classrooms, there could also be an art room, a music room, a gym, and a cafeteria, but at the K-Grade 5, Middle School, or K-Grade 8 school level, those rooms don't count for capacity.

Program capacity for high schools is calculated differently, taking into account typical class sizes as well as how often a classroom is used throughout the day. A typical high school program sample calculation is:

School B: 900-1299	# Teaching Stations	# Students/Teaching Station	Building Capacity	% Utilization	Program Capacity
Core Academic Classroom (English, Math, Social Studies, World Language, ESOL, Health)	26	28	728	85%	619
Science Classroom/Lab	6	28	168	85%	143
Special Populations Classroom	2	12	24	85%	20
Teaching Stations Specific to Program	6	28	168	85%	143
Visual Arts Classroom	1	28	28	85%	24
Band Room	1	28	28	85%	24
Choir Room	1	28	28	85%	24
Gymnasium	2	32	64	85%	54
Auxiliary Gymnasium	1	32	32	85%	27
Multipurpose Activity Room	0	32	0	85%	0
Total	46		1,268		1,078

Q: DO WE HAVE TO USE THE BUILDING IN THE WAY DESCRIBED IN THE CAPACITY MODEL?

A: The models are meant to indicate an average of the typical way the building may be used. However, the number of classes per grade, students per class, schedule, etc., will likely vary, from year to year. If for example, the art classroom in a K-Grade 5 school were used as a grade-level classroom, the number of students served would increase. The number of variations in the way educational programs fit into our buildings is extensive, and the way spaces are used will vary over the life of the building.

Q: WHAT IS A “PROJECT MANAGER”? IS THERE ONE FOR HISD PROJECTS?

A: A project manager’s responsibility is to be certain that projects are designed and constructed on time, within budget, and within the approved scope of work. All schools undergoing construction and renovation within HISD will have a project manager.


Q: WHOM SHOULD I CONTACT FOR INFORMATION ABOUT A PROJECT?

A: Status updates can be found on the district’s website at BuildHISD.org . Any problems or concerns identified by the PAT members will be brought to the attention of the HISD Project Manager during regularly scheduled PAT meetings or through emails to the principal, who will be the primary point of contact with the Program Manager outside of the regularly scheduled meetings.

Q: WHAT IS INCLUDED IN A CONSTRUCTION PROJECT?

A: The objective of a construction project is to make physical changes to a facility or to build a new facility to meet program requirements. All HISD construction projects will meet the requirements of the Educational Specifications, which outline the size and number of required spaces, relationships between spaces, and functional requirements for each space, and the Design Standards, which define the quality and scope of the various systems built in the facility. A construction project also incorporates standards required by applicable codes, strives to improve energy conservation and operations and maintenance efficiencies, and improves appearance.

There are eight general phases to a capital construction project:

-  **SITE-SPECIFIC EDUCATIONAL SPECIFICATIONS DEVELOPMENT**
-  **CONCEPTUAL DEVELOPMENT**
-  **SCHEMATIC DESIGN (PRELIMINARY DESIGN)**
-  **DESIGN DEVELOPMENT (DETAILED FACILITY AND SYSTEMS ANALYSIS)**
-  **CONSTRUCTION DOCUMENTS**
-  **BIDDING AND PERMITTING**
-  **CONSTRUCTION**
-  **OCCUPANCY & WARRANTY PERIOD**

Q: MAY A PROJECT ADVISORY TEAM CHANGE THE BUILDING DURING DESIGN TO MEET UNIQUE FEATURES OF AN EDUCATIONAL PROGRAM?

A: Project budgets have been established based on Educational Specification and Design Standards developed by HISD. These standards have been created to provide maximum flexibility for a wide variety of current and future educational program delivery alternatives. During the planning and design process, facilities planning and design experts will work with the site-based Project Advisory Teams to develop Educational Specifications and a design that best suits their needs. Once the Schematic Design submittal is approved, only minor changes to the layout of the building will be possible.

BUILDING TURN-OVER ISSUES:

Q: WHO IS RESPONSIBLE FOR MOVING A PROGRAM FROM ITS EXISTING LOCATION TO ITS NEW LOCATION? WHAT IF THE PROGRAM IS MOVING INTO SWING SPACE?

A: The HISD Logistics Coordinator will work with the principal and staff to accomplish smooth transitions from the existing facility into the completed building when construction is finished. If necessary to transition into a temporary space prior to the move into the permanent facility, the goal will be to minimize disruption to normal school operations.

Q: WHAT FURNITURE WILL BE PURCHASED? WHEN AND HOW DOES THAT HAPPEN?

A: Moveable furnishings (FF&E) are listed for each room in the Educational Specifications for a project. The list is used as the foundation for furniture selections and purchases. The PAT and Architect will be consulted during the selection process to assure the design concept of the new facility is supported. Specialized program needs will be discussed with the Project Advisory Team to ensure that spaces can function to support instruction and service delivery. The HISD Manager of FF&E and the Logistics Coordinator will work with the Project Advisory Team to develop a furniture and transition plan.

Q: WHO IS MY CONTACT FOR WHAT I NEED TO KNOW AND DO DURING THE TRANSITION TO A NEW BUILDING?

A: The Project Manager is the main point of contact, however, at the beginning of the project the Principal will be given a contact list for HISD staff who will be working with the principal and PAT during the planning, design, construction, and occupancy phases of the project.

| GLOSSARY OF TERMS |

BAS: Building Automation System (HVAC and lighting controls)

CHANGE ORDER: A modification to the original construction contract authorizing a change in the work or an adjustment in the amount of the contract or the contract time.

CONSTRUCTION COMMISSIONING: A collaborative process whose purpose is to ensure that buildings and systems perform according to contract.

COMMISSIONING AGENT: An independent party, unaffiliated with the design team or contractors, who takes charge of the construction commissioning process.

DAY LIGHTING: Planned energy conservation strategy that utilizes illumination from sunlight.

PROGRAM OR CONCEPT DESIGN: Single line drawings that illustrate room adjacencies and scale.

SCHEMATIC DESIGN: The schematic design submission typically includes a simple site plan, floor plans (simple scale drawings that show room sizes, relationships, doors, and windows), simple building cross sections, an outline specification with general information about building systems, a table comparing required square footages from the Educational Specifications with actual square footages shown on the drawings, a preliminary estimate of cost options, and possibly 3-dimensional depictions of the exterior of the building.

DESIGN DEVELOPMENT: Schematic design drawings are further developed to include more detail, such as a detailed site plan; room layouts; door and window types; interior and exterior elevations; reflected ceiling plans; plumbing, mechanical, structural, and electrical drawings: kitchen layouts. etc.

CONSTRUCTION DOCUMENTS: These are extremely detailed drawings and specifications showing and describing all of the details required to construct the building.

DESIGN TEAM: A group of professionals from architectural and engineering firms who are engaged to design a facility.

FF&E: Furniture, fixtures and equipment. This describes all contents that are not a permanent part of the structure.

HARD COSTS: These are expenses associated with direct construction of a project.

HVAC: Heating, ventilation, and air-conditioning.

LEADERSHIP IN ENERGY AND ENVIRONMENTAL DESIGN (LEED): A building certification process developed by the U.S. Green Building Council (USGBC) to enhance environmental awareness among architects and building contractors, and to encourage the design and construction of energy-efficient, water-conserving buildings that use sustainable or green resources and materials.

SCHEDULE OF VALUES: An itemization of costs that comprises the entire contract amount.

SWING SPACE: A school building or a portion of an existing school building or other facility that can be used as transition space to house students, staff and teachers during the school construction process.

| PROJECT ADVISORY TEAM AGREEMENT |

As a member of the Project Advisory Team for _____ School, I realize that my participation in the planning, design, and construction process is important to the success of the project. I agree to participate in scheduled monthly meetings for the duration of the project. I will communicate with the stakeholders that I represent in a structured and ongoing basis.

If I have to miss a meeting, I will be responsible for securing an alternate who will participate in my place and communicate to me what I missed during the meeting. If I realize that my ongoing participation will not be possible, I will resign to allow someone else to take my place.

I agree to respect the parameters that have been set for the project budget, schedule, and scope of work.

I agree to respect and treat other members of the PAT, as well as HISD staff, design professionals and other consultants who may participate in PAT meetings in a professional and polite manner. I realize that failure to do so may result in a request for me to withdraw from the Project Advisory Team.

NAME

DATE