



## **I. Policy Statement**

The Board of Education is responsible for providing safe, engaging and supportive educational and work environments for all students and staff. The Board recognizes the continuing need to plan, design, and construct new educational facilities and to renovate or make additions to existing schools that are in accordance with all applicable code, as well as Maryland and federal law. Fulfilling this responsibility requires a comprehensive program that monitors population trends, enrollment trends, educational program spatial requirements, cost/benefit considerations, technologies that support environmentally responsible construction, and an annual six-year capital improvement program.

## **II. Purpose**

The purpose of the policy is to establish guidelines for the administration of the School Planning and the School Construction programs.

## **III. Definitions**

Within the context of this policy, the following definitions apply:

- A. Architect/Engineering Firm (A/E) – A designation usually reserved by law for a person or organization professionally qualified and duly licensed to perform architectural and/or engineering services including, but not necessarily limited to, analysis of project requirements; creation and development of the project design; preparation of drawings, specifications, and bidding requirements; and general administration of the construction contract.
- B. Beneficial Occupancy – The use by the owner of a project or portion thereof before all the terms of the contract are complete.
- C. Bid – The price a contractor commits to for constructing a project.
- D. Bid Procedures – Criteria to determine the award of a contract pursuant to Policy 4050 Procurement of Capital Materials, Supplies, Equipment and Services.
- E. Bonds – General obligation documents issued by the county to borrow money to fund capital projects.

- F. Capital Improvement Program (CIP) – All capital improvements listed as part of the Board’s annual approved capital budget.
- G. Capital Improvement Project – Any physical betterment or improvement and any preliminary studies and surveys relative thereto, including but not limited to, any property of a permanent nature, and equipment needed in connection with such improvement when first erected or acquired.
- H. Change Order – A written document to the contractor signed by the owner and engineer or architect, issued after the execution of the contract, authorizing a change in the work or an adjustment in the contract sum.
- I. Construction Manager (CM) – A person or organization hired to coordinate and manage the construction phases of a project with the objective of minimizing project construction time and cost while maintaining the quality, function, and aesthetics of the building.
- J. Design Stages – The three phases of an architect’s basic services, which include:
  - 1. Schematic Design (SD) – the first phase of the architect's basic services. In this phase, the architect meets with the project planning team to ascertain the requirements of the project and prepares schematic design studies consisting of drawings and other documents illustrating the scale and relationship of the project components for approval by the Board. A statement of probable construction cost is also submitted at this time.
  - 2. Design Development (DD) – the second phase of the architect's basic services. In this phase the architect prepares, from the approved schematic design studies, the design development documents for approval by the Board. These design documents consist of drawings and other documents to fix and describe the size and character of the entire project as to structural, mechanical and electrical systems, materials and other essentials as may be appropriate. The architect also submits to the Board a further statement of probable construction costs.
  - 3. Construction Documents (CD) – the third phase of the architect's basic services. In this phase the architect prepares, from the approved design development documents, the working drawings, specifications, and necessary bidding information for approval by the Board. A final cost estimate is prepared before the project is bid.
- K. Facility Design – Plans, elevations, sections, and other drawings and specifications that may be necessary for a building or other structure.

- L. Facility Planning – Educational and architectural planning and analysis used to produce and design the concept for school projects.
- M. Final Occupancy – The point at which all or a designated portion of a building complies with the provisions of a contract and all applicable county and state statutes and regulations.
- N. Interagency Committee on School Construction (IAC) – The state agency responsible for the review/approval of construction documents and funding of schools or school construction projects.
- O. Office of Safety, Environment and Risk Management – The office that is responsible for reviewing and monitoring the design and construction phases related to environmental initiatives, such as Integrated Pest Management (IPM), Indoor Air Quality (IAQ), and Asbestos Abatement.
- P. Office of School Construction – The office that is responsible for all phases of planning, design and construction of new schools as well as additions to and comprehensive modernization of existing schools, from planning through occupancy.
- Q. Office of School Planning – The office that is responsible for projecting needs based on demographics for the purpose of assisting the Superintendent in the development of the Capital Improvement Program.
- R. Punch List – List made near the completion of work, indicating items to be furnished or work to be performed by the contractor or subcontractor in order to complete the work as specified in the contract documents.
- S. State of Maryland Public School Construction Program (PSCP) – Program that provides for the funding of public school construction.
- T. Sustainable Design – Design that seeks to reduce negative impacts on the environment and the health and comfort of building occupants, thereby improving building performance. The objectives of sustainability are to reduce consumption of non-renewable resources, minimize waste, and create healthy, productive environments.
- U. Warranty/Guarantee Period – Period of time in which the quality of work and/or satisfactory performance is guaranteed.

#### IV. Standards

- A. This policy and associated implementation procedures apply to the capital improvement projects that are listed as part of the Board's annual approved capital budget requiring contracts and consultant agreements.
- B. The Howard County Public School System (HCPSS) employs sustainable design construction that supports educational program needs and creates a safe and nurturing environment for students and staff within allotted budgetary resources.
- C. The school planning/school construction program involves a sequential plan of action and is divided into ten general categories, each requiring professionally trained and experienced staff to plan and carry out the requirements of the program consistent with the Superintendent's Safety Guidelines for Renovation and Construction Projects and all applicable regulations.
  - 1. Long-Range Planning and Student Population Projection
    - a. This category involves the annual projection of pupil population and general population growth by the Office of School Planning. Short-range demographic studies to support the Capital Improvement Program, school attendance area studies, transportation planning, and other special needs are also included.
    - b. By state regulation the Board is also required to develop, maintain, and annually update a master plan for the school system for submission to the IAC. This plan has as its basis a variety of population studies which guide the decision making for school facilities on both a long and short-term basis.
  - 2. Capital Improvement Program
    - a. The Capital Improvement Program is a projection of the school facility needs for the next fiscal year (Capital Budget) and the following five-year period. The Capital Improvement Program is based on needs to support the educational program of the system with new schools, modernizations, and other construction projects.
    - b. The local Capital Improvement Program serves as the basis for state funding requests through the Interagency Committee for School Construction and the State of Maryland Public School Construction Program.

3. Site Selection

Procedures for site selection and summarization of site size criteria for elementary, middle and high schools are addressed in Policy 6000 Site Selection and Acquisition. As part of the selection process, the Office of School Construction produces studies including site layouts and environmental assessments.

4. Architect/Engineering Firm and Construction Manager Selection

Procedures for architectural/engineering and construction management services selection are addressed in Policy 6030 Procurement of Architectural/Engineering and Construction Management Services.

5. Facility Planning and Facility Design

The facility planning and design process allows for orderly and systematic design of school facilities. This process is conducted using either the Board-approved General Elementary Educational Specifications for New Schools, General Educational Specifications for New Howard County Middle Schools, General Educational Specifications High Schools, or the Board approved Guidelines Manual for Renovations and Modernizations of Existing Schools as the basic references for the facility in question. These documents describe the basic educational philosophy, instructional program, and spatial requirements needed to implement the planning and construction program.

6. Bid and Award

The bid and award procedures for school construction projects conform to those used for the procurement of other goods and services which are addressed in Policy 4050. In addition, these procedures comply with the requirements of the State of Maryland Public School Construction Program.

7. Contract and Construction Administration

The Office of School Construction is responsible for monitoring construction work and administering the schedule, budget, and change orders that affect the scope and/or cost of the work. A school construction progress report which includes these topics is submitted monthly to the Board.

In accordance with the provisions of Policy 6030, a construction manager may be hired to manage the construction process.

8. Official Acceptance of Capital Improvement Projects

Capital improvement projects may be designed to be accepted in stages or upon total completion of work, based on staff recommendation to and approval by the Board.

9. Post-Acceptance Evaluation

Use, occupancy, and evaluation by staff may occur only after the project has been officially accepted. The Board will receive a final report following the walk-through.

10. Temporary and Relocatable Facilities

Relocatable classroom units should be considered under the following conditions and within the context of Policy 6010 School Attendance Areas:

- a. Where school population growth occurs
- b. Where school capacity is near maximum
- c. When boundary lines are adjusted
- d. Where population is projected to remain high for at least one year
- e. Where school construction or renovation projects require the provision of swing space to accommodate the student population and minimize the impact on instruction.

Where excess population is projected to remain beyond four years, consideration should be given to an addition or new construction.

- D. To the extent possible, school facilities and sites should be available for after school use by the community. The possibility of joint use development of school and recreational facilities, including joint construction of school and recreational space, is encouraged on a case-by-case basis.

**V. Compliance**

- A. The Superintendent/Designee is responsible for the administration of the school planning and construction programs.
- B. The Office of School Planning and the Office of School Construction are responsible for collaboration in order to obtain the efficient implementation of this policy.
- C. For Capital Improvement Projects, the Principal is responsible for communicating project information to the parent community in a timely manner.

## VI. Delegation of Authority

The Superintendent is authorized to develop appropriate procedures to implement this policy.

## VII. References

### A. Legal

The Annotated Code of Maryland, Education Article

§ 3-602.1 (requirements to design high performance buildings)

§ 4-115 (right to acquire land, school sites or buildings)

§ 4-116 (land use approval procedures)

§ 4-117 (construction and remodeling conformance to state and county building codes)

§ 5-301 (Board of Public Works role and procedures in school construction)

§ 5-302 (composition and role of the IAC in school construction)

§ 5-303 (procedure for determining the cost of renovating existing schools)

§ 5-312 (state funding support related to high performance buildings)

§ 7-108 (guidelines for community use of public school facilities)

§ 7-109 (use of public school facilities as day care centers)

COMAR 13A.01.02.03 (requirements for obtaining State Superintendent's approval for school construction projects)

COMAR 15.05.02 (regulations pertaining to integrated Pest Management and Notification of Pesticide Use in a Public School Building or on School Grounds)

Americans with Disabilities Act (ADA)

Occupational Safety and Health Act (OSHA)

Maryland Occupational Safety and Health Act (MOSHA)

### B. Other Board Policies

Policy 4050 Procurement of Capital Materials, Supplies, Equipment, and Services

Policy 6000 Site Selection and Acquisition

Policy 6010 School Attendance Areas

Policy 6030 Procurement of Architectural/Engineering and Construction Management Services

### C. Other

General Elementary Educational Specifications for New Schools

General Educational Specifications for New Howard County Middle Schools

General Educational Specifications High Schools

Guidelines Manual for Renovations and Modernizations of Existing Schools

Safety Guidelines for Renovation and Construction Projects

**VIII. History**

ADOPTED: September 4, 1968

REVIEWED:

MODIFIED: August 14, 2014

REVISED: September 13, 1990  
January 14, 2010

EFFECTIVE: August 14, 2014