

# HOW TO START YOUR SCHOOL-BASED SITE IMPROVEMENT PROJECT

**STEP 1**  
MAKE A PLAN



**STEP 2**  
INTRODUCTIONS



**STEP 3**  
DESIGN



**STEP 4**  
BID AND CONSTRUCT

# STEP 1: ORGANIZE

## STEP 1 SUMMARY

Organize as a group and involve the Principal

### MAKE A PLAN

- Identify exactly what you want to do on your school property and coordinate with and involve the Principal as a first step.
- With input and buy-in from the Principal, identify a small committee to spearhead the project that is comprised of interested individuals, such as parents, community members, local civic association members, and teachers.
- Start a fund raising plan and identify a potential mechanism to store or distribute the funds once raised (eg. a Friends Of nonprofit group, SDP 'Fund', etc.). Reach out to the Office of Grants to inquire about fundraising.
- Reach out to local design firms and companies who are experienced in playground and/or site improvement projects to inquire about design fees and the design process.

*Note: Only after you have completed STEP 1, proceed to STEP 2.*

# STEP 2: INTRODUCTIONS

## STEP 2 SUMMARY & CONTACT INFORMATION

Introductory Email - Leigh Clark, Elizabeth Gutman, Nicole Ward

\*contact information listed at the end of document

## SCHEDULE A MEET AND GREET WITH THE OFFICE OF CAPITAL PROGRAMS (OCP) AND THE OFFICE OF GENERAL COUNSEL (OGC)

### Introductory Email

Send one introductory email outlining your goals and general plan for your project, addressed to the contact people listed above. Together, the Office of Capital Programs and the Office of General Counsel will set up a phone conference or an in person meeting with your group to discuss your goals. They will also direct you the appropriate design project manager and outline potential legal documentation or agreements that may be required for your project.

*Note: Include the principal on all email correspondence and meeting invites. Only proceed to STEP 3 after completing STEP 2.*

# STEP 3: DESIGN

## ENGAGE / HIRE A DESIGN PROFESSIONAL AND COORDINATE DESIGN REVIEWS & SITE ACCESS AGREEMENTS

## STEP 3 SUMMARY & CONTACT INFORMATION

Design Review - Julie Skierski

Drawing Archive Review - Shira Lomax

Right of Entry Agreement - Elizabeth Gutman

Background Clearances - Office of Employee Records (Coordinate with Shira Lomax)

Phase 1 Environmental Assessment - Francine Locke, Office of Environmental & Management Services (OEMS)

\*contact information listed at the end of document

### Professional Design Documents

Design documents for construction purposes consist of plans and written technical specifications. All work to be constructed on School District of Philadelphia property must comply with any applicable codes and safety requirements. Design documents for most site improvements must be signed and sealed from a licensed professional registered in the state of Pennsylvania. The type of licensed professional will vary depending on the type of improvements being constructed. Some examples of licensed professionals and the types of projects that they may work on include, but are not limited to:

- Architect: Buildings, Windows, Roofs and Interiors
- Electrical Engineer: Site & Building Lighting
- Civil Engineer: Paving, Stormwater Management, Grading and Drainage, and Utility Connections to Buildings
- Landscape Architect: Playground Design, Pavement, Fencing, Seating, Outdoor Classrooms, Recreational Elements, Planting Design, Grading and Drainage
- Mechanical Engineer: Plumbing, Toilets, Water Fountains, Heating and Cooling Systems.
- Structural Engineer: Shade Structures, Site Walls Higher than 36 inches, Façade Repair, Rooftop Improvements, Fence and Guardrail Mounting on Top of Walls, Attachments to Buildings or Walls.

### Right of Entry Agreement

A Right of Entry legal agreement is required when access is needed onto School District property for a specific design service to be performed, such as an existing conditions site survey or stormwater infiltration testing. Typically, legal agreements can take up to 1 – 2 months to execute, but some take longer so be sure to prepare ahead. You must provide the following in one email to Liz Gutman in the Office of General Counsel in order to start the Right of Entry process:

1. Company name and contact information, including email address
2. Date window for work to be performed (be sure to leave enough time to execute the agreement and perform the work)
3. Brief description of work
4. Final plans and installation details that have been reviewed and approved by the Office of Capital Programs
5. Background Clearances for all personnel to be accessing the site by the Office of Employee Records – SEE BELOW
6. Certificate of Insurance per the attached insurance requirements (SEE APPENDIX A).

*NOTE: Utilizing volunteers, school staff, and students for projects have very specific legal requirements. The principal must discuss this information with OGC early on to ensure that the appropriate process is followed. Also, if access to property involves construction of design elements (eg. installation of basketball hoops), then a Right of Entry / Site License Agreement is needed - SEE STEP 4).*

### Background Clearances

Contacts: Shira Lomax & Office of Employee Records, 215-400-4600, clearances@philasd.org

All individuals who will be entering School District property to perform work or design services are required by law to obtain criminal background checks (state and federal) and child abuse clearances. The three required clearances are as follows:

- PA Criminal Background Check
- PA Child Abuse History Clearance
- Dept of Education FBI Fingerprinting (federal background check)

All clearances must be current (within 1 year), and reviewed **AND** approved by the Office of Employee Records **PRIOR** to personnel entering School District Property. Clearances must be renewed annually and must be provided for each individual. Coordinate with Shira Lomax in OCP to begin the process and follow the instructions located within the Contractor Clearance Review Sheet (as provided by Shira Lomax). Notify Shira when all clearances have been approved by emailing her the Contractor Clearance Review sheet filled out and approved by Employee Records.

### Phase 1 Environmental Review

Contact Francine Locke in the OEMS office to inquire if your project will require a Phase 1 environmental review.

### Design Review

Submit complete drawing sets and technical specifications (in CSI format), prepared by a design professional, for review and approval to Julie Skierski (or other designated project manager) in the Office of Capital Programs. A cost estimate must be submitted if the School District will be conducting the bidding and Construction Management and Inspection for the project. The design professional of record will need to submit drawings to all regulatory agencies for technical review independently, according to each agency's required schedule. Complete drawing sets typically include an existing conditions survey, demolition, site, materials, layout, post construction stormwater management, and erosion & sediment control plans, details, plan enlargements, cross sections, and elevations as necessary to accurately communicate design intent for the purposes of construction, including plans required for regulatory review, such as stormwater management design and erosion and sediment control plans, on 30" x 42" sized paper.

## Required Design Submissions

SDP requires approximately two to three weeks for design document review, which should be accounted for in project schedules. Required submissions include:

1. Concept / Pre Design – design should comply with OCP Design Standards. Partners should keep SDP informed of general design direction throughout the process, focusing on design items and any coordination issues
2. Schematic Design - for review and approval
3. Design Development + draft technical specs - for review and approval
4. 90% Construction Docs + substantially complete technical specs - for review and approval
5. 100% Bid Documents and Technical Specs (for information only)

If at any point in the design process a significant design change occurs, OCP shall be notified in writing and provide marked and highlighted drawings and specs with such changes and allow OCP two to three weeks for review and approval. During construction and/or at the time of bidding, all design changes to previously approved bid documents must be approved in writing by OCP.

Upon completion of each review, OCP will issue a Standard Architectural and Engineering Comments Form with compiled comments. The Partner group is expected to incorporate and/or address all comments prior to the next submission.

## SRC / Board Resolution

See step 4 for preparation of an SRC resolution, as this may impact your project schedule.

## Permits and Approvals

The design professional of record is responsible for designing to all applicable codes and coordinating any regulatory reviews and approvals by the Philadelphia Water Department, the Pennsylvania Department of Environmental Protection (PADEP), the Department of Licenses and Inspections, Philadelphia Art and Historical Commissions, and Streets.

## Playground Design Basic Requirements

1. All playground designs must comply with the Consumer Product Safety Commission's (CPSC) Public Playground Safety handbook, which is available for free download here:

<https://www.cpsc.gov/PageFiles/122149/325.pdf> (English)

<https://www.cpsc.gov/PageFiles/122149/325s.pdf> (Español)

2. All manufactured playground equipment must be IPEMA certified (International Play Equipment Manufacturers Association).
3. All protective surfacing beneath playground equipment must be poured in place rubber (unless otherwise approved) and at a thickness determined by each piece of equipment's tallest fall height and confirmed by ASTM testing.
4. All playground designs must be ADA accessible.

## Required Playground Closeout Documents (at completion of construction)

1. Inspection report by a 3rd party Certified Playground Safety Inspector (CPSI), documenting that the project complies with all applicable safety standards.
2. ASTM F1292 Testing and Report with passing scores documented for each play structure or functionally linked play structures.
3. Synthetic turf surface installation testing, conducted in accordance with ASTM F1936-10, using certified, calibrated CB II test equipment as per ASTM F355 Method A in order to evaluate the shock absorbing characteristics of the surface, with acceptable GMAX range.

## General Required Project Closeout Documents (at completion of construction)

- One CD with all of the following documents in .pdf format: Original bid drawings and project manual (in .pdf format and final AutoCAD drawings for bidding set), As-Built Survey (in .pdf and AutoCAD formats), digital copies of signed legal agreements, approvals and permits from regulatory agencies, digital O&M Manual with product warranties and maintenance procedures.

## Schedule Milestones

In order to have a successful project, many steps must fall into place. Here are typical schedule milestones that need to be considered at the onset of every project in order to achieve desired construction dates:

1. A&E Notice to Proceed (NTP) Date
2. Schematic Design (25%) Submission Date to SDP
3. Design Development (60%) Submission Date to SDP
4. Construction Documents (90%) Submission Date to SDP
5. Bid Documents (100%) Submission Date to SDP
6. Advertisement Date
7. Bid Receipt Date
8. SRC / Board Resolution Materials Submitted to SDP (a minimum of 7 weeks prior to the desired SRC date)
9. SRC / Board Meeting Date
10. Construction NTP Date

# STEP 4: BID & CONSTRUCT

## STEP 4 SUMMARY & CONTACT INFORMATION

**Construction manager - Jessica Binda-Rischow**

**SRC Resolution - Elizabeth Gutman / Julie Skierski / Leigh Clark**

**Right of Entry / Site License Agreement / Legal Counsel Coordination - Elizabeth Gutman**

**Background Clearances - Office of Employee Records (Coordinate with Shira Lomax)**

**Environmental Coordination - Francine Locke, Office of Environmental & Management Services (OEMS)**

## BIDDING & CONSTRUCTION LOGISTICS

### Bidding the project

1. Legal Counsel Coordination:
  - Public Bidding Requirements - Consult with Elizabeth Gutman in the OGC to determine the legal requirements for bidding your project.
  - Maintenance Agreement - Depending on the type of project, the Partner group typically works with SDP legal to develop a maintenance agreement for the improvements.
2. Bid Process (can be done two different ways). School District bids project and provides construction management and inspection:
  - Provide final bid documents and cost estimate to SDP
  - School District follows standard procedures for public bidding and consults with the architect/engineer of record for the project.
  - Partner group bids the project and provides construction management and inspection
    - Partner group bids the project per school district requirements (consult with the OGC).

### SRC / Board Approval & Acceptance of Donation

Upon award to the lowest qualified bidder, a resolution must be prepared by the Office of Capital Programs to accept a donation for projects that are \$20,000 or greater. The following information will need to be provided to Leigh Clark within the Office of Capital Programs and Elizabeth Gutman within the Office of General Counsel directly after the bid award is made and a minimum of 6 weeks prior to the desired SRC / Board Meeting date:

- Dates for the project
- Description of existing conditions
- Description of scope of work (what is being constructed / installed, brief summary of the type of improvements, location of the improvements, and other features)
- Project square footage
- Contractor name and contact information, including an email
- Contract amount
- 8.5" x 11" site plan

## Right of Entry / Site License Agreement

This legal agreement is necessary when access onto School District property involves construction activities.

The following information should be provided to Elizabeth Gutman in the OGC in one email to initiate the Right of Entry / Site License Agreement:

1. Company name and contact information, including email address
2. Date window for work to be performed (be sure to leave enough time to execute the agreement and perform the work)
3. Brief description of work
4. Final plans and installation details that have been reviewed and approved by the Office of Capital Programs
5. Background Clearances for all personnel to be accessing the site by the Office of Employee Records – *SEE STEP 3*
6. Certificate of Insurance per the attached insurance requirements (*SEE APPENDIX A*).

NOTE: Utilizing volunteers, school staff, and students for projects have very specific legal requirements. The principal must discuss this information with Elizabeth Gutman in the OGC early on to ensure that the appropriate process is followed.

## Construction Coordination

Contact Jessica Binda-Rischow to discuss construction logistics, have a School District Construction Project Manager and Inspector assigned to the project, and to schedule a construction kick-off meeting with the school, Contractor, and SDP Project Manager and Inspector.

# CONTACT INFORMATION

Name	Title	Email	Phone	Department	Oversees
Jessica Binda - Rischow	Construction Manager	JBindaRischow@philasd.org	215-400-5668	Capital Programs	Construction
Leigh Clark	Operations Manager	lclark@philasd.org	215-400-5196	Capital Programs	Permission and initial contact to do construction on School District Properties / SRC Resolution Preparation
Elizabeth Gutman	Office of General Counsel	egulman@philasd.org	215-400-5154	Office of General Counsel	Right of Entry / Site License Agreements / SRC Resolution Preparation
Gerald Junod	Environmental Manager	gjunod@philasd.org	215-400-6738	Office of Environmental & Management Services (OEMS)	Environmental review, including Phase 1 coordination
Francine Locke	Environmental Director	flocke@philasd.org	215-400-5213	Office of Environmental & Management Services (OEMS)	Environmental review, including Phase 1 coordination
Shira Lomax	Capital Programs	slomaxsdp@gmail.com	215-400-5178	Capital Programs	Coordinates plan archive review and security clearance approval tracking from Employee Records
Matt Melady	Exec. Director of Operations	mmelady@philasd.org	215-400-6353	Facilities	General operations of the school, including trash / dumpsters, snow removal, cleaning, exterior maintenance
Office of Employee Records	NA	clearances@philasd.org	215-400-4600	Office of Employee Records	Background Clearance Review - PA Criminal History, PA Child Abuse History, Dept. of Education FBI Fingerprinting
Scott Ovington	Director of Operations	sovington@philasd.org	215-651-5019	Facilities	General operations of the school, including trash / dumpsters, snow removal, cleaning, exterior maintenance
Julie Skierski	Site Improvement Coordinator	jskierski@philasd.org	215-400-5221	Capital Programs	Design document review for site improvements
Mike Sonkowsky	Director, Grants	msonkowsky@philasd.org	215-400-5738	Office of Grant Development	Fundraising and grant research and grant writing and submission coordination.
Barbara Strand	Real Property Management	bstrand@philasd.org	215-400-5332	Real Property Management	Deed acquisition; property ownership questions
Nicole Ward	Design Manager	nward@philasd.org	215-400-5304	Capital Programs	Permission and initial contact to do construction on School District Properties; Oversees design unit.

# **APPENDIX A**

## **INSURANCE REQUIREMENTS - RIGHT OF ENTRY**

**THE SCHOOL DISTRICT OF PHILADELPHIA**

INSURANCE REQUIREMENTS FROM LICENSE AND RIGHT OF ENTRY FORM

a. Unless otherwise approved by the Licensor in writing, Licensee shall procure and maintain in full force and effect, at its sole cost and expense, and shall cause its contractors and subcontractors to procure and maintain in full force and effect, at their sole cost and expense, covering the performance of services in connection with this Agreement, the types and minimum limits of insurance specified below. All insurance shall be procured from reputable insurers admitted to do business on a direct basis in the Commonwealth of Pennsylvania, or otherwise acceptable to the Licensor. All insurance must be afforded by an insurance carrier with at least an A- (Excellent) rating from a reputable agency (e.g., A.M. Best). All insurance required herein, except Professional Liability Insurance, shall be written on an “occurrence” basis and not a “claims-made” basis. In no event shall work be performed until the required evidence of insurance has been furnished. The insurance shall provide for at least thirty (30) days prior written notice to be given to the Licensor in the event coverage is materially changed, cancelled or non-renewed. The Licensor, its officers, employees and agents, shall be named as additional insureds on the General Liability Policy. An endorsement is required stating that the coverage afforded the Licensor, its officers, employees and agents, as additional insureds, will be primary to any other coverage available to them and, that no act or omission of the Licensor shall invalidate the coverage. The Licensor may require higher limits of liability if, in Licensor’s reasonable discretion, the potential risk so warrants.

(1) Workers’ Compensation and Employers Liability

(a) Statutory Workers’ Compensation Insurance in accordance with the laws of the Commonwealth of Pennsylvania;

(b) Employers Liability: \$100,000 each accident – bodily injury by accident; \$100,000 each employee – bodily injury by disease; and \$500,000 policy limit – bodily injury by disease.

(2) Commercial General Liability

(a) Limit of liability: \$1,000,000 per occurrence combined single limit for bodily injury (including death) and property damage liability; \$1,000,000 advertising injury; \$2,000,000 general aggregate and \$2,000,000 aggregate for products and completed operations.

(b) Coverage: Premises operations; blanket contractual liability; personal injury liability (employee exclusion deleted); products and completed operations; independent contractors; employees and volunteers as additional insureds; cross liability; and broad form property damage (including completed operations).



(3) Commercial Automobile Liability

(a) Limit of Liability: \$1,000,000 per occurrence combined single limit for bodily injury (including death) and property damage liability.

(b) Coverage: Owned, non-owned and hired vehicles

(4) “All Risks” Property Insurance covering all business personal property, equipment, trade fixtures and property in Licensee’s care, custody and control, in an amount equal to the full replacement cost with no penalty for coinsurance.

(5) Waiver of Subrogation. The insurance policies required in paragraph (2) and (3) (including paragraph (4), if applicable) above shall include an endorsement waiving rights of subrogation in favor of the Additional Insureds described in paragraph 9(a) above.

b. The insurance requirements set forth herein are not intended and shall not be construed to modify, limit or reduce the indemnifications made in this Agreement by the Licensee or its contractors or subcontractors to the School District or to limit Licensee’s and their contractor’s and subcontractor’s liability under this Agreement to the limits of the policies of insurance required to be maintained by Licensee, their contractors and subcontractors.

c. Original certificates of insurance (or clear and legible photocopies with originals to be promptly submitted thereafter) evidencing the required coverages and copies of the endorsements evidencing full compliance with all insurance requirements, shall be submitted by the Licensee to the School District at the following address.

The School District of Philadelphia  
Risk Management Office  
440 North Broad Street, 3<sup>rd</sup> Floor  
Philadelphia, Pa 19130  
Phone: (215) 400-4590

This submission must be made ten (10) days prior to performance of any services under this Agreement. The ten (10) day requirement for advance documentation of coverage may be waived in such situations where such waiver will benefit the Licensor but under no circumstances shall Licensee’s employees, volunteers, contractors or subcontractors actually begin work without providing the required evidence of insurance. The actual endorsement adding the School District as an additional insured must specifically reference the **PROJECT NAME HERE** and be submitted to the School District at the above address. The School District reserves the right to require Licensee to furnish certified copies of the original policies of all insurance required under this Agreement at any time upon ten (10) days prior written notice to Licensee. Licensor and Licensee agree that Licensee’s Certificate of Insurance, attached hereto as Exhibit E, is accepted as evidence that Licensee has met the insurance requirements set forth in Paragraph 9 of this Agreement.