



# Tustin Unified School District

Program Administrator

Presentation to the Citizen's Oversight  
Committee

March 10, 2004

**PINNACLEONE**

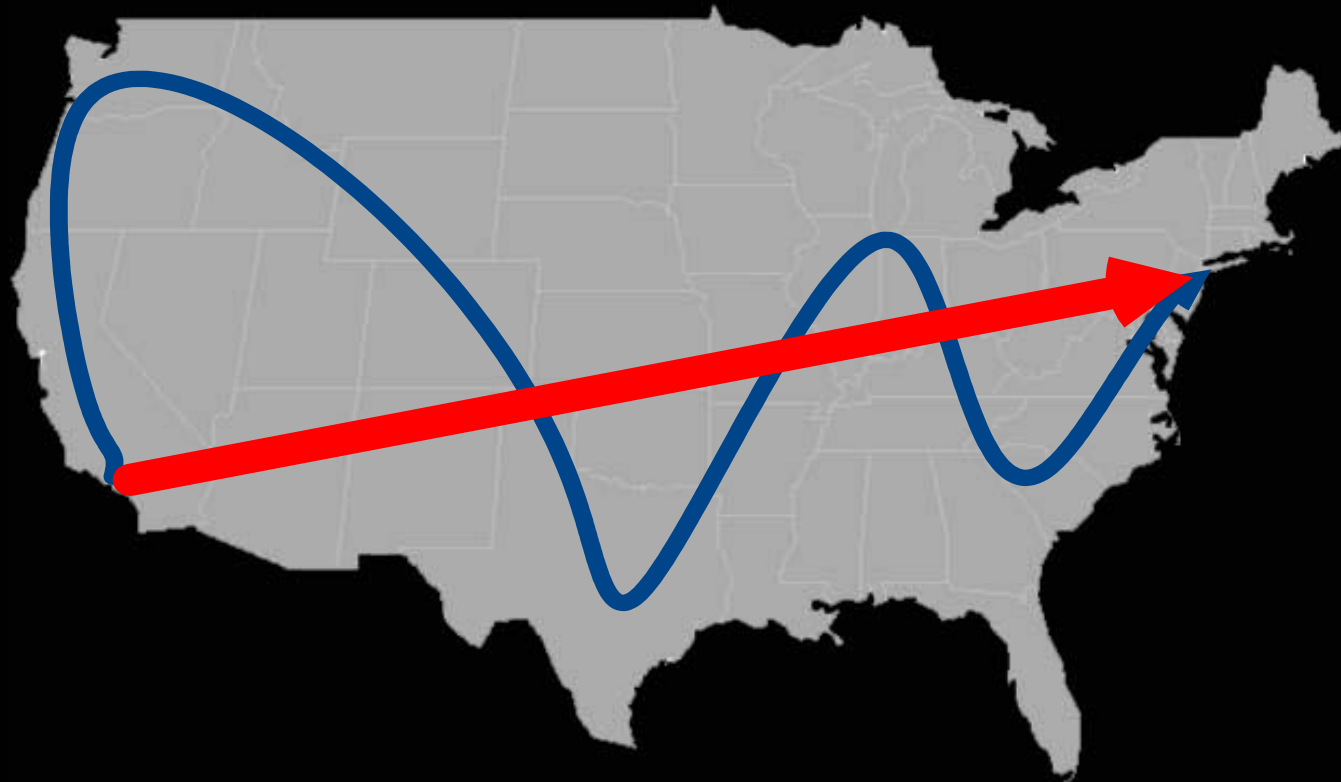
The cornerstone of confidence.™



**tustin**  
Unified School District

***Students are Number 1!***

# ***Implementation Plans***



***The Road Map to Success***



## *Developing a Plan*

- » **WHY** it is important to develop a program implementation plan
- » **HOW** to develop a program implementation plan
- » **WHAT COMES NEXT** after the development of the implementation plan



## **WHY develop a Plan**

» In November 2000, California voters passed Proposition 39

Now bond measures are required by law to include:

- A list of the specific school facilities projects to be funded (an FMP)
- An annual, independent performance audit
- An annual, independent financial audit



## **WHY develop a Plan**

- » Prop. 39 requires districts to spend monies to develop the **“what”** and the **“where”** of their programs prior to initiating a bond measure
- » Similarly, although not yet required by law, it is wise to make major decisions regarding the **“how”** and **“when”** of the program at the same time



## **WHY develop a Plan**

» **By their nature, capital improvement programs involve a large number of people (stakeholders) with different expectations of the program**

**Board of Education**

**District staff**

**Site administrators**

**Students**

**Oversight committee**

**Community groups**

**. . . and more**



## WHY develop a Plan

- » We have found that there is no greater opportunity to impact the future success of a program than to:
- develop and communicate **a single, unified set of goals for the program** and a well conceived plan to achieve them, and,
  - **communicate, communicate, communicate** - the plan itself, the actions being taken to implement the plan, and the results.



## How to develop a Plan

» The plan should be developed to meet two primary objectives:

- ① **to engender confidence** that the program has been well conceived and planned, and that it will successfully deliver all of the improvements promised to the voters in an efficient and cost effective manner
- ② **to provide master budget and schedule benchmarks** to guide the development of the long-term program management plan for the program and to serve as the basis for reporting the success of the management team in meeting the expectations of the program





## How to develop a Plan

» The previous two objectives give structure to the plan:

- ① to engender confidence that promises made will be kept  
- The first component of the plan is **the strategic plan** including sections for: goals, objectives, facts, assumptions, strategies, resources, organizational structure and information & controls
- ② to provide master budget and schedule benchmarks -  
The second component of the plan includes **the master schedule** for the program and **the cash-flow curve**



## Section 1: Strategic Planning

- » **GOALS:** All programs are established to fulfill some need or requirement specified by management. Each has a specific goal to reach.
- » **STRATEGIES:** Program goals can only be achieved within the established time, cost and schedule constraints by developing strategies that are focused on efficiently accomplishing the projects in accordance with the established program priorities.



*Students are Number 1!*

**Section 1: Strategic Planning**

» At PinnacleOne we use a workshop format where all discussions are written on 5 ½" by 8 ½" cards and taped to the wall by topic groups





**Section 1: Strategic Planning**

» The card format allows all issues to be visible to the planning group at all times. Issues can be easily moved, removed or reprioritized during the meetings.

**H**  
MAINTAIN CURRENT  
GRADE CONFIGURATION

FMP-TAB 6

**T**  
ATTENDANCE CHANGES  
OCCUR ONLY ONCE

**D**  
PROTECT TAXPAYER  
INVESTMENT IN  
DISTRICT PROPERTY

FMP-TAB 4

**A**  
ENHANCE STUDENT  
ACHIEVEMENT  
- SUPPORTS DISTRICT'S  
STRATEGIC PLAN  
**JOB #1**

FMP-TAB 4

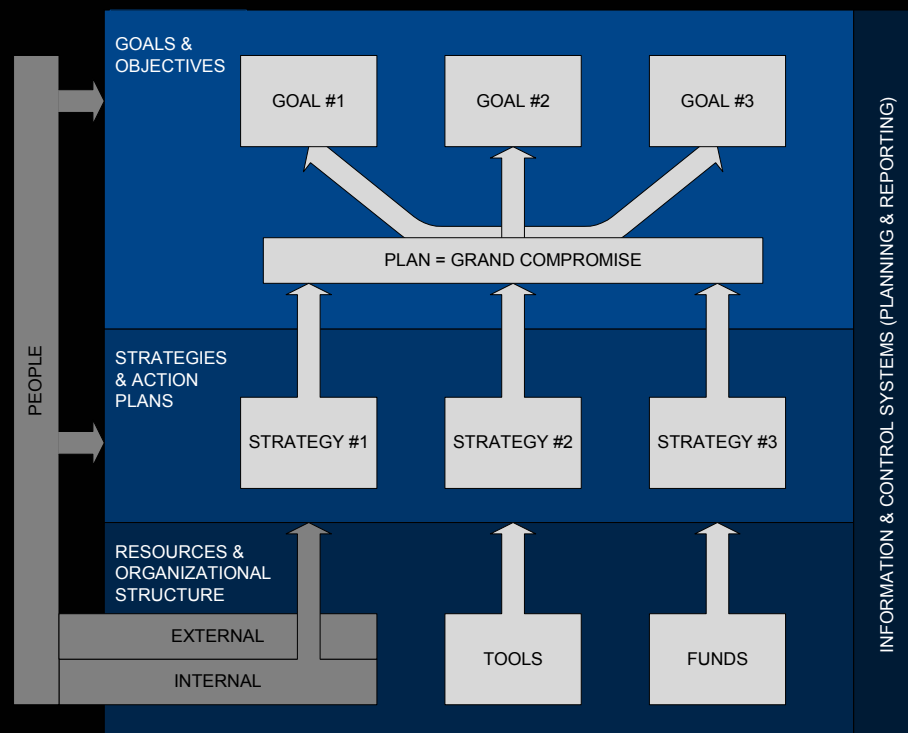


*Students are Number 1!*

# Section 1: Strategic Planning

» With such a large number of stakeholders with different expectations of the program conflicts among their goals are unavoidable

The workshop process encourages the identification and mitigation of conflict





**Section 2: Schedule & Funding**

- » **Review and establish prioritization procedures for the program and begin to assign proposed completion dates based on the goals and priorities of the program.**
- » **This establishes the first draft of the master schedule for the program. It will be extremely important at this point to validate the feasibility of delivering the projects as scheduled.**



**» Consider the impacts of:**

- ① The need to update or establish district standards for design and construction
- ② The cash-flow requirements of the master schedule vs. efficient procurement of capital (including escalation, financing costs, and arbitrage.)
- ③ The capabilities of the design and contracting communities
- ④ The packaging of the program work based on impacts to school sites, long-lead procurement items, trade-contractor capabilities, labor availability and pricing advantages
- ⑤ The potential use of alternative-delivery strategies to meet program objectives and/or manage risk or quality control



**Section 2: Schedule & Funding**

- » **Establish the overall program budget and cost and revenue load the master schedule activities to determine the anticipated cash-flow needs of the program**  
(don't forget to include contingencies, escalation costs, soft costs and hard costs)
- » **Brainstorm ideas to maximize the use of state and federal funding and evaluate financing approaches based on their ability to achieve the program objectives**

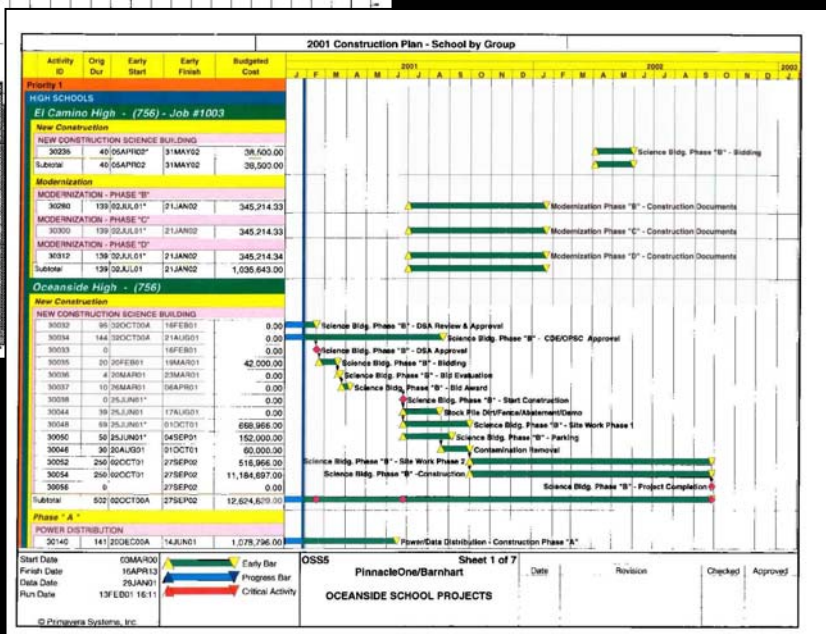
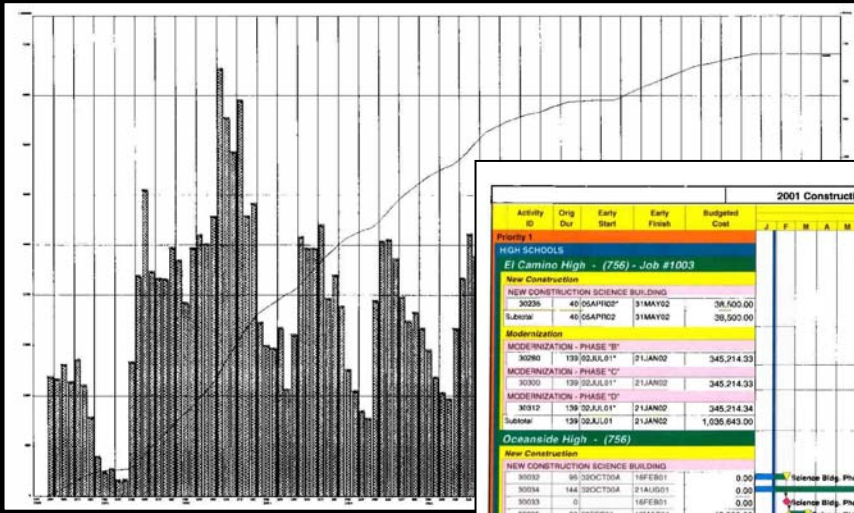




*Students are Number 1!*

**Section 2: Schedule & Funding**

» Revise the master schedule until the desired completion dates, number of seats created and funding are reconciled





# WHAT COMES NEXT

- » **March 30<sup>th</sup> – Meet with Dr. Gorman, Brock Wagner and Don Bishop to develop plan**
- » **April 7<sup>th</sup> – Review plan with Trittippo Architects and Barnhart – revise plan**
- » **April 20<sup>th</sup> – Review plan with TUSD principals – revise plan**
- » **May 18<sup>th</sup> – Review plan with TUSD board – revise plan**



## WHAT COMES NEXT

- » Review and revise the plan as necessary -  
The implementation plan will remain a work in progress as it changes to meet the changing requirements of the program



*Students are Number 1!*

**Questions?**





***Students are Number 1!***

**PINNACLEONE**  
The cornerstone of confidence.



***Helping you build their future.***