

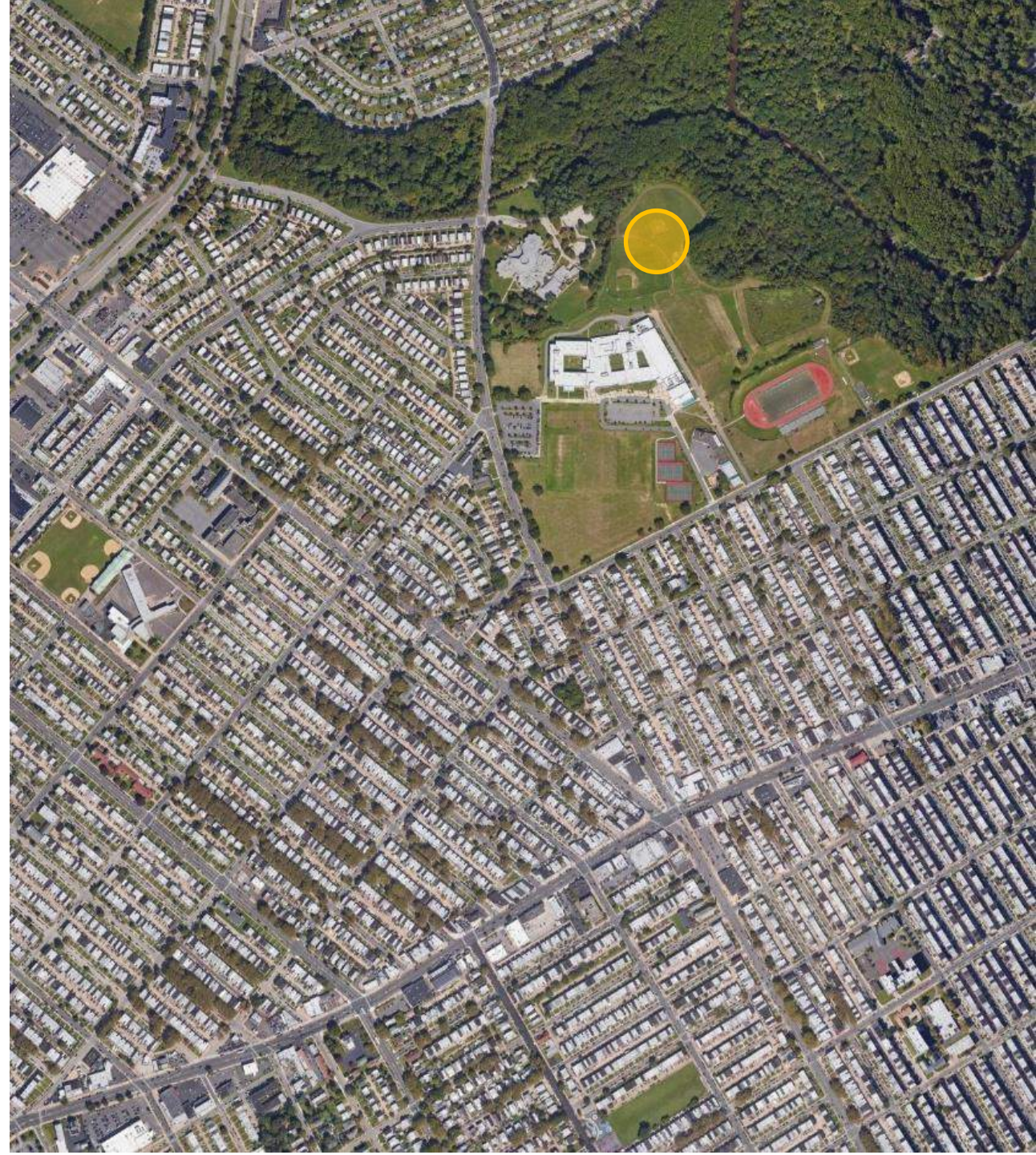
IN A FOREST OF A HUNDRED  
THOUSAND TREES, NO TWO LEAVES  
ARE ALIKE.  
AND NO TWO JOURNEYS ALONG  
THE SAME PATH ARE ALIKE.

PAULO COELHO



# Leveraging Alternative Delivery in Philadelphia: Lessons Learned from Northeast Community Propel Academy

A Turn-key K-8 School for  
The School District of Philadelphia





# Who we are:

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Questions related to specific materials, methods, and services will be addressed at the conclusion of this presentation.



# Learning Objectives

At the end of this course, participants will be able to:

1. Understand potential benefits of Private-Public Partnership delivery, and what characteristics may be important in selection P3 partners.
2. Outline the process implications for districts considering P3 delivery, including identifying the types of internal structures and resources that should be in place prior to engagement to facilitate an effective P3 collaboration
3. Understand practical and process-orientated work methods that contribute to an organization's successful mitigation of risks, and for securing desired outcomes.
4. Appreciate the challenges and opportunities associated with designing a large, Next Generation K-8 facility

# ALEP Core Competencies

## **1. Educational Facility Implementation, Project Management / Project Delivery**

We will explore the Public-Private Partnership development model, which allowed for an expedited design and construction process within a pre-established fixed budget, with no change orders and reduced risk to the School District. The Builder partner was a stakeholder from concept through construction, and understood the "why" behind the planning of space as well as the selection of materials. This true partnership worked together to deliver the student-centered next generation learning environments and address disparities in their system.

## **2. Ethics / Professionalism**

In the School District of Philadelphia's Equity Framework, "equity" means to "Cultivate prosperity and liberation for students and staff, starting with historically marginalized populations, by removing barriers, increasing access and inclusion, building trusting relationships, and creating a shared culture of social responsibility and organizational accountability." By using a P3 delivery model - streamlining design-to-delivery, reducing financial risk, and engaging builders as partners early in the conversation - SDP can better manage its capital resources and more quickly address the disparities in their system.



# agenda

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## Context

Project Overview

Project Delivery

What is P3?

Case Studies

Things to Consider

Break Out Groups

Project Design

Discussion

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# OVERVIEW



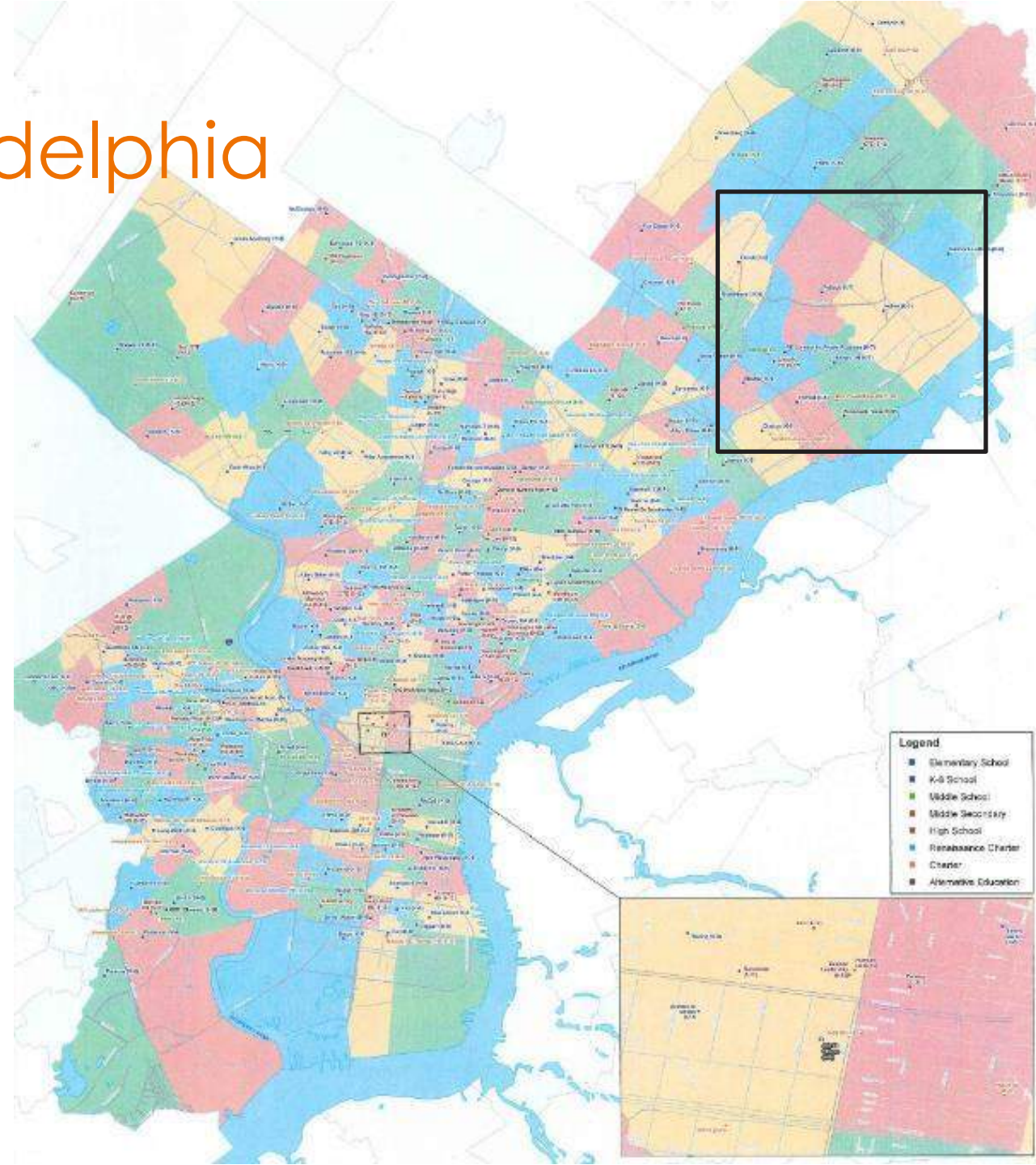


# School District of Philadelphia

198,645 students

323 schools

Enrollment: Slight Decline





2018

# Northeast Philadelphia

4779 of students

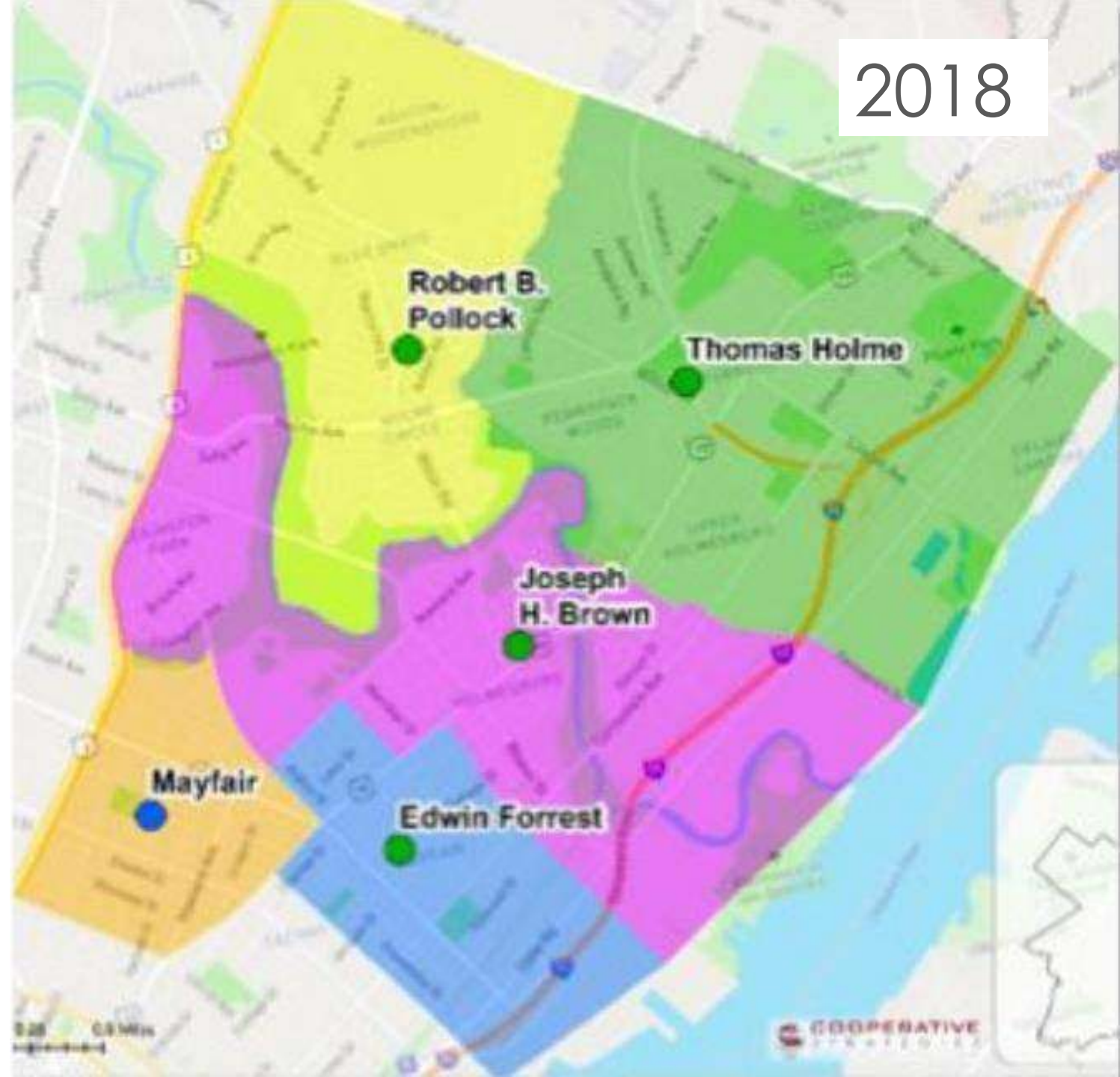
3 K-5 Schools

1 K-6 School

1 K-8 School

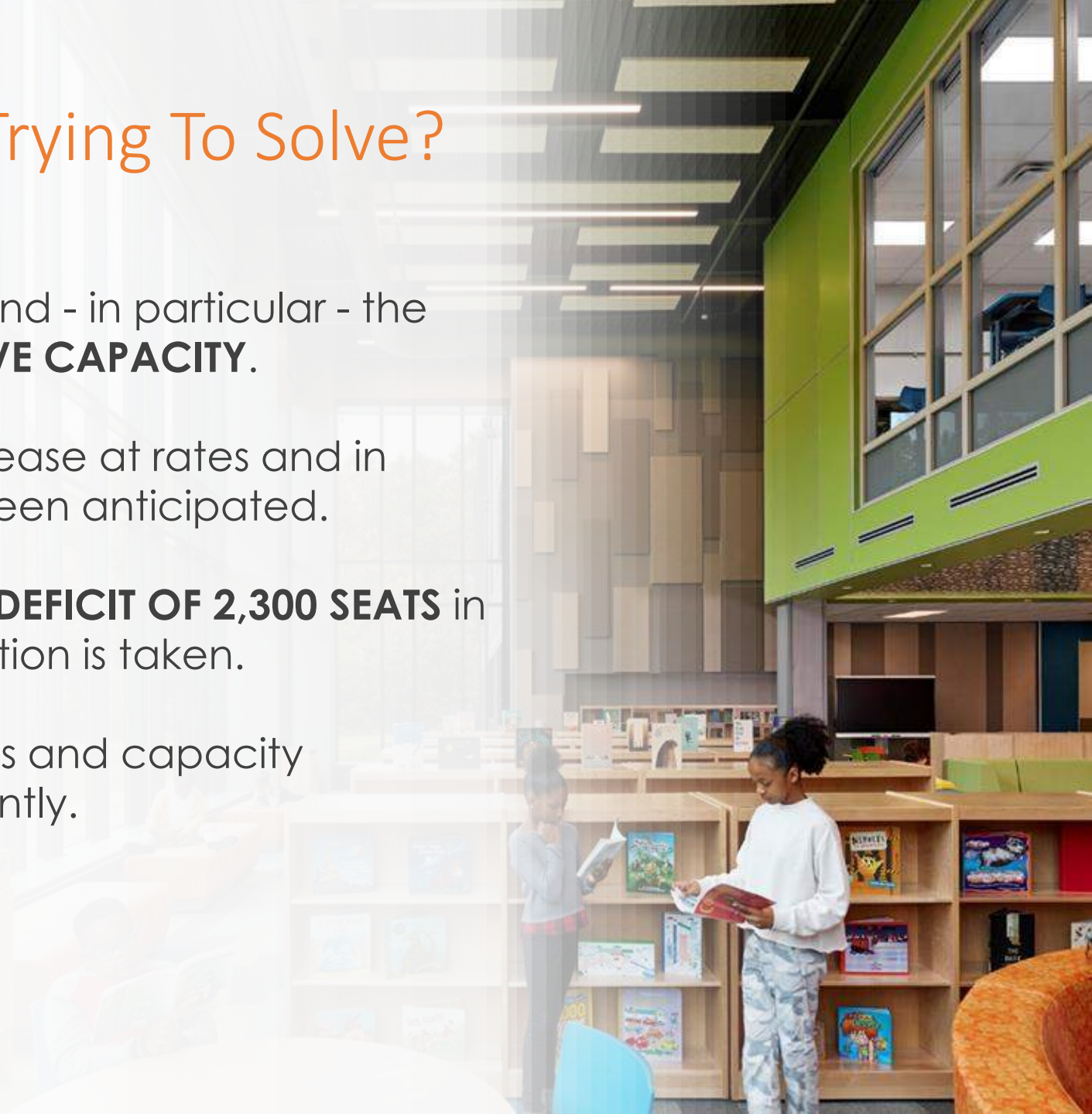
1 Middle School

Unprecedented growth



# What Problem Are We Trying To Solve?

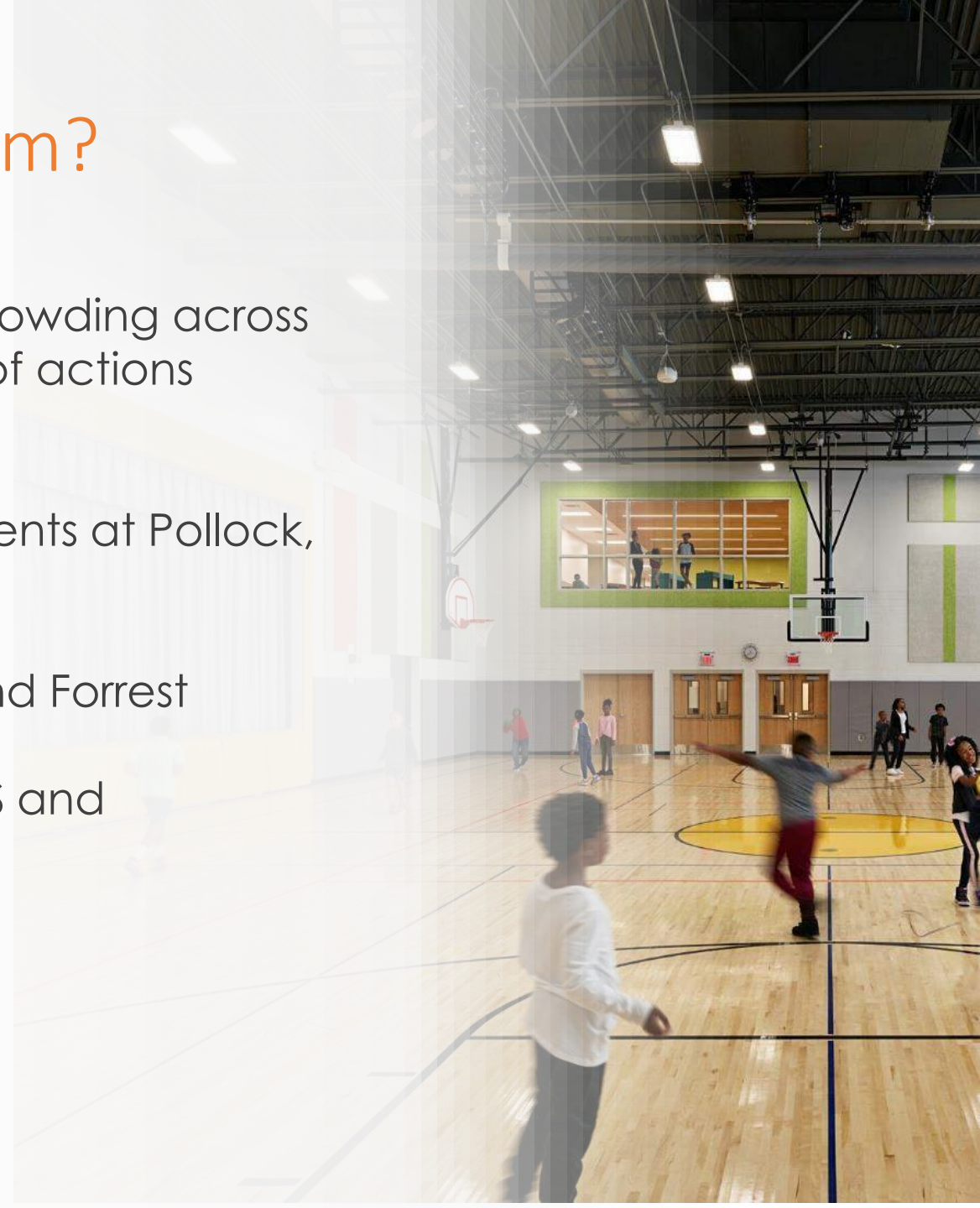
- Many schools in the northeast and - in particular - the Lincoln HS catchment are **ABOVE CAPACITY**.
  - Enrollment continues to increase at rates and in ways that could not have been anticipated.
  - The District has projected a **DEFICIT OF 2,300 SEATS** in school year 2022-23 if no action is taken.
- We need to address the facilities and capacity challenges **QUICKLY** and efficiently.





# How Can We Solve This Problem?

- Balance enrollment and eliminate overcrowding across schools in the northeast through a series of actions including:
  - Completing additions and improvements at Pollock, Holme, and Mayfair
  - Making improvements at JH Brown and Forrest
  - **CHANGING GRADE CONFIGURATIONS** and attendance boundaries
  - **BUILDING A NEW K-8 SCHOOL**





# Where Can We Build?



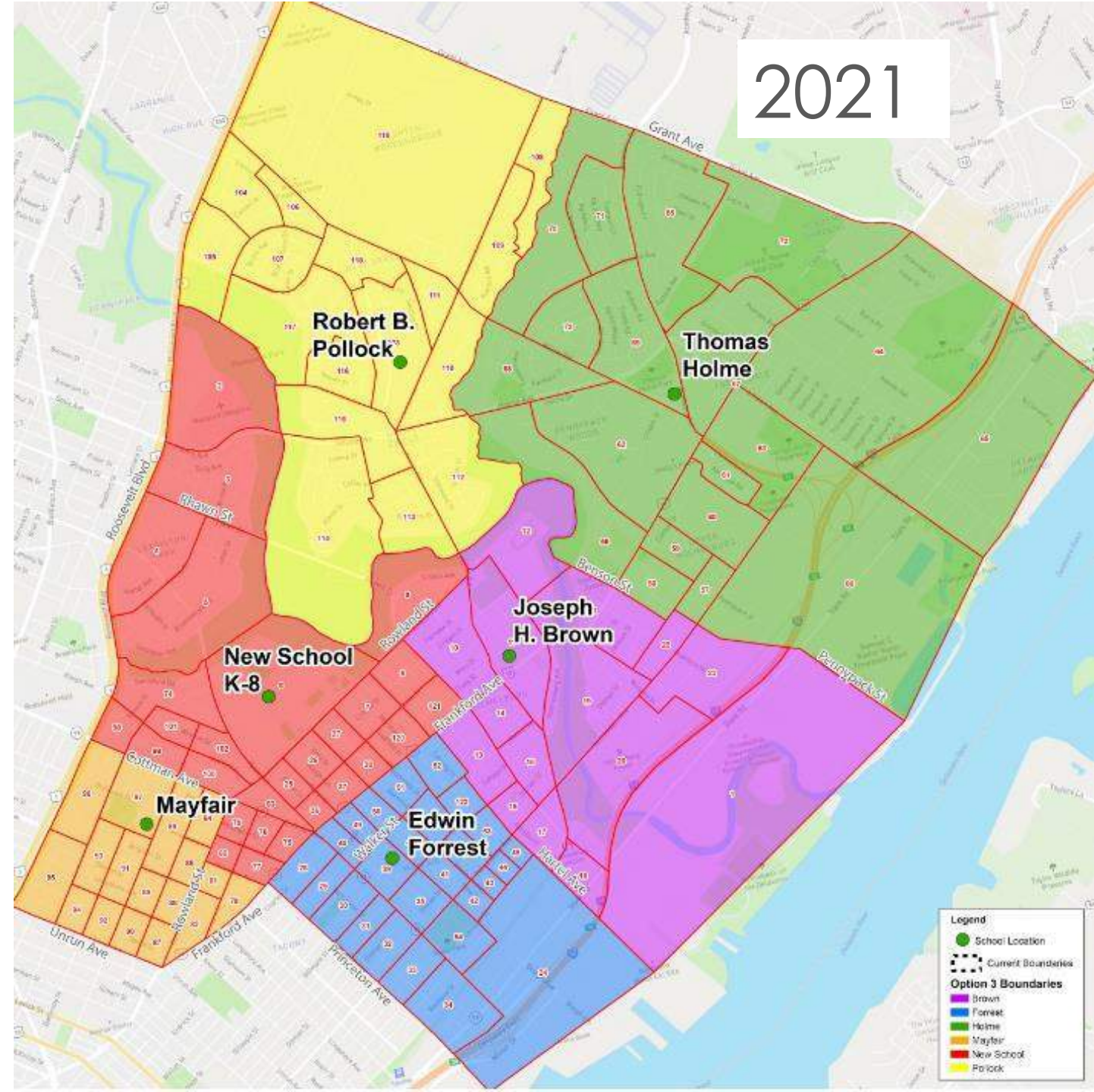
# Northeast Philadelphia

5235 of students

5 K-8 Schools

1 K-5 School

Enrollment: Unpredictable



# How do we Build?

Design  
Bid  
Build



DESIGN  
TEAM

GENERAL  
CONTRACTOR

MECHANICAL  
CONTRACTOR

ELECTRICAL  
CONTRACTOR

PLUMBING  
CONTRACTOR

FOUR INDEPENDENT PRIME CONTRACTORS

DBB

**53  
MOS**

DESIGN

CONSTRUCTION

P3

**32  
MOS**

DESIGN

CONSTRUCTION

**40% QUICKER**

P3 /  
Turnkey



GUARANTEED  
MAXIMUM  
PRICE

DEVELOPER

BUILDER

DESIGN  
TEAM

ALL DESIGN AND  
CONTRACTOR SUBS





DELIVERY



# What is a public-private partnership?

- An “alternate” model to deliver public assets
- A **public-private partnership (PPP, 3P, or P3)** is an arrangement between two or more public and private sectors of a long-term nature.<sup>[1][2]</sup>
- Typically, it involves
  - private capital financing government projects and services up-front, and
  - then drawing profits from taxpayers and/or users over the course of the PPP contract

## Notes:

1. Hodge, G. A and Greve, C. (2007), Public-Private Partnerships: An International Performance Review, Public Administration Review, 2007, Vol. 67(3), pp. 545–558
2. Jump up to:<sup>a b c d</sup> Roehrich, Jens K.; Lewis, Michael A.; George, Gerard (2014). "Are public-private partnerships a healthy f? A systematic literature review". *Social Science & Medicine*. **113**: 110–119. doi:10.1016/j.socscimed.2014.03.037. PMID 24861412



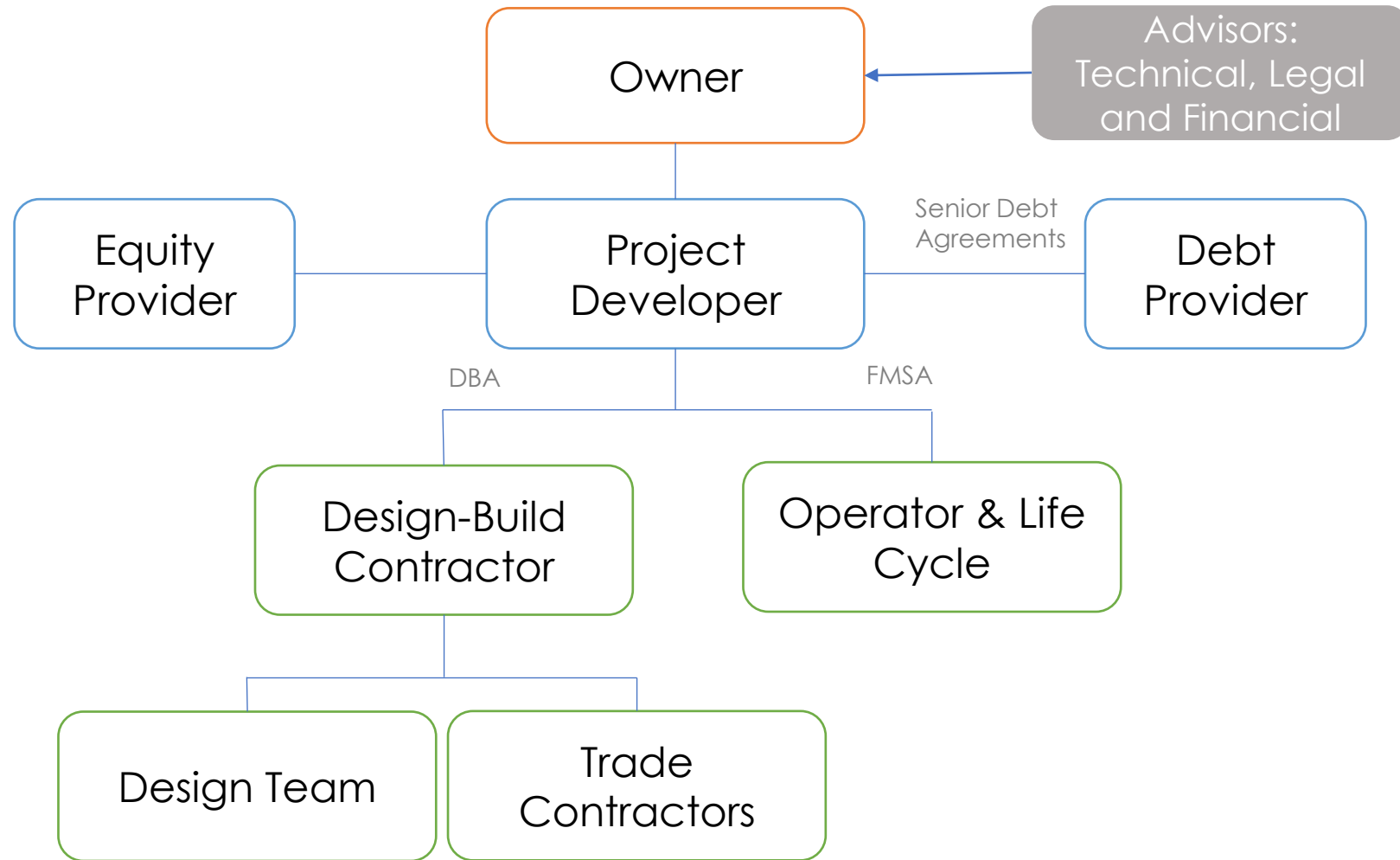


# Are all P3s the same?

- Build-Finance
- Build-Operate-Transfer
- Build-Own-Operate
- Build-Own-Operate-Transfer
- Build-Lease-Transfer
- Design-Build-Finance
- Design-Build-Finance-Maintain
- Design-Build-Finance-Maintain-Operate
- Design-Build-Operate-Transfer
- Design-Construct-Manage-Finance
- Operation & Maintenance Contract



# How might a “P3 be structured?





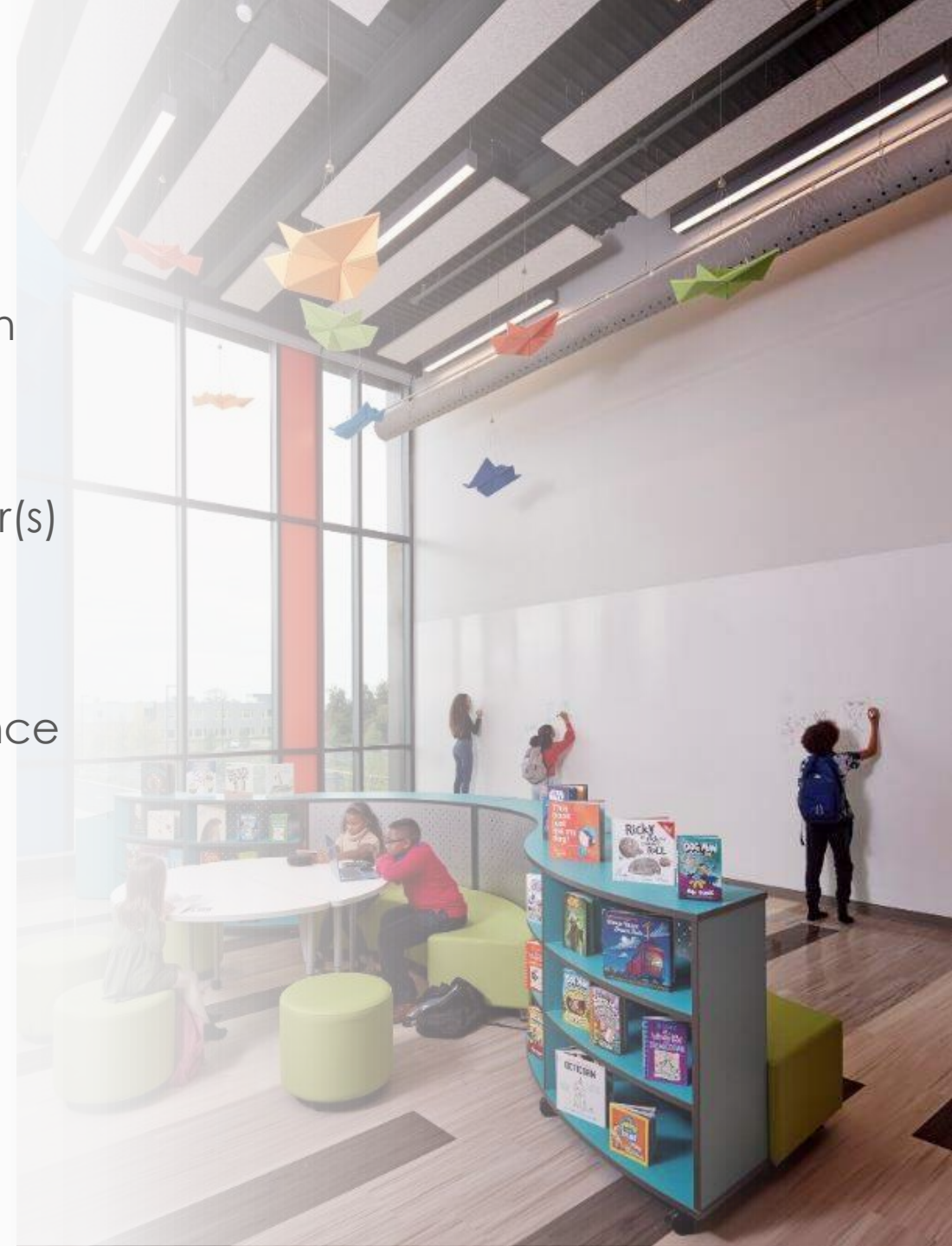
# Why is a “P3” attractive?

## The Promise

- One procurement process with upfront decision making
- An external funding source
- Transfer Execution Risks to Private Sector Partner(s)
- Cost and Schedule Certainty
- Speed to occupancy
- Options for Life Cycle, Operations & Maintenance

## The Risks / Concerns

- Choosing the ‘Right’ Partners
- Design – Getting what is wanted
- Lack of Transparency
- Loss of Access / Control





# CASE STUDY





# School District of Philadelphia's [SDP] 'P3' Experience

## Northeast Community Propel Academy

### Turn-Key, Design-Build

- SDP “sells” a sub-divided parcel within a larger campus to a Developer-Builder (DB)
- DB engages the Design Team
- Agreement establishes a GMP and date certain for “sell-back” of property and completed school

## THE ASK

**DELIVER <32 mos**

**K-8 for +1,660  
STUDENTS**

**180,000 GSF**

**TURN-KEY,  
DESIGN-BUILD**

# SDP's Perspective: Why "Turn-key"?

## Addressing the District's Needs:

- **TURN-KEY = FASTEST PATH**  
for occupancy of new seats
- **CERTAINTY:** Date and Cost

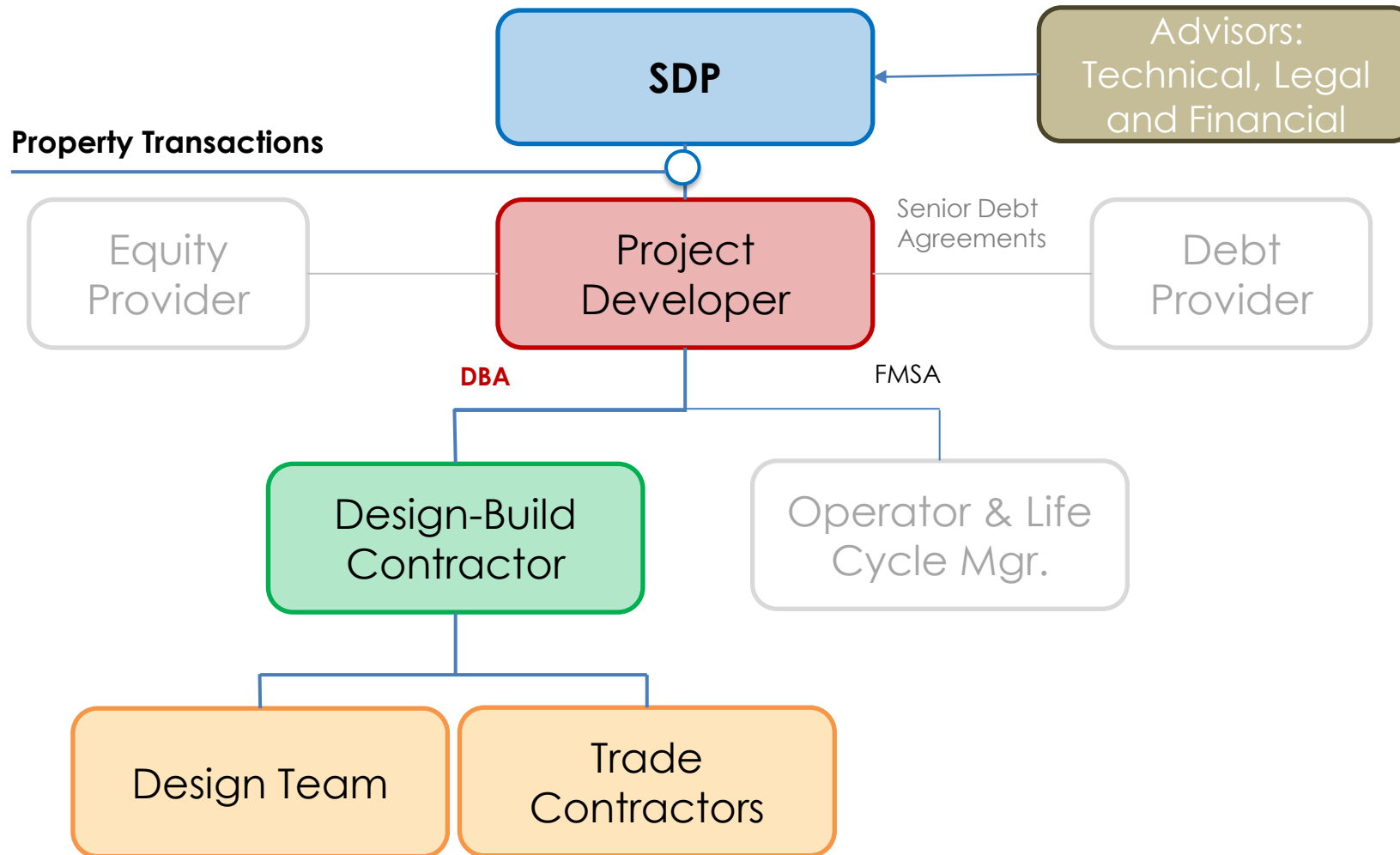
## Additional Benefits (along the way):

- **VALUE** - Ability to work directly with design team AND sub-contractors during Pre-Development Phase
- **SINGLE SOURCE** – Critical in quick reactions during COVID-impacted construction period





# SDP's "P3" Partnership Arrangement:



# SDP's Perspective: Maintaining Control

How did SDP address concerns about a loss of control?

- **Updated Educational Specifications** & Design Standards
- A Full-Time Project Manager
- **Pre-Development Agreement** thru 60% of Design & Documentation
  - Secured design prior to GMP & property transaction
- **“Big Room” design process** throughout Pre-Development Phase
  - Negotiated “value” decisions along the way
  - Contributed to quick reactions during COVID



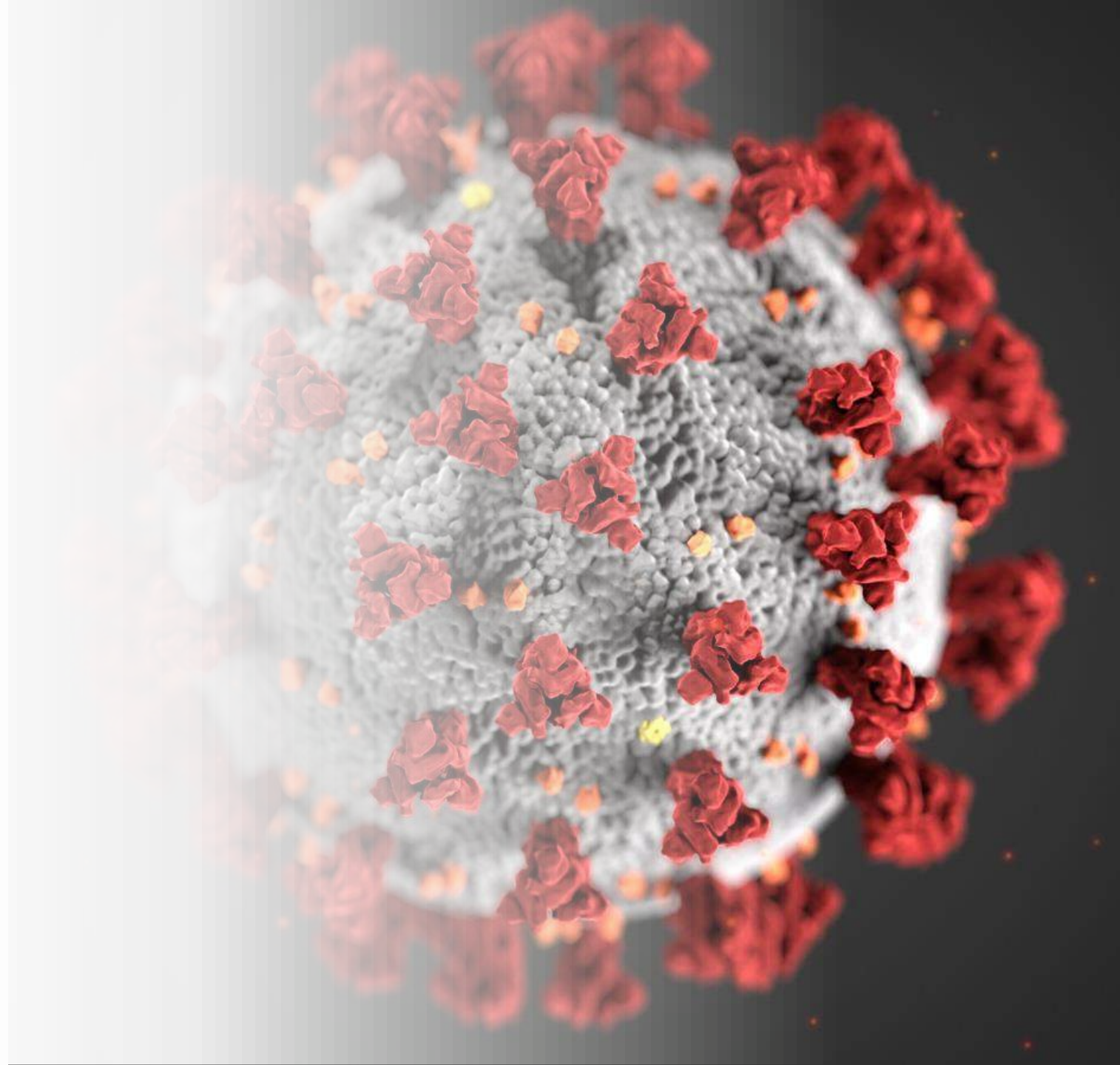
# Maintaining Control: Dedicated “Big Room”



Co-located in the Architect's conference room with ample drawing pin-up and large screen technology enable robust debate and optimized the ability to achieve more nuanced design consensus.

## P3: Partnership

- Unidentified End User
- Change In District Leadership
- COVID-19
- Supply Chain Management





# The result?...Delivery speed.





# CASE STUDY





# Prince George's County (PGCPS) 'P3' Experience

## Six New Schools

### Design-Build-Finance-Maintain

- Finance-Developer Team constructs six new schools, engaging
  - Developer-Builder, Design Team &
  - Service Contract Provider
- Service Contract Provider maintains facilities for 30-year period
- District retains Ownership and Management of the Schools

## THE CHALLENGE

**2015: Face >\$8B  
Deferred  
Maintenance**

**Urgent Need for  
8,000 Seats**

**Seeking Certainty,  
Cost & Delivery**

# PGCPS's Preparation for a "P3" delivery:

## Familiar Needs:

- **ACCELERATED DELIVERY**  
1 MILLION SF / 6 New Schools
- **CERTAINTY:** Date and Cost
- **30-YEAR MAINTENANCE**

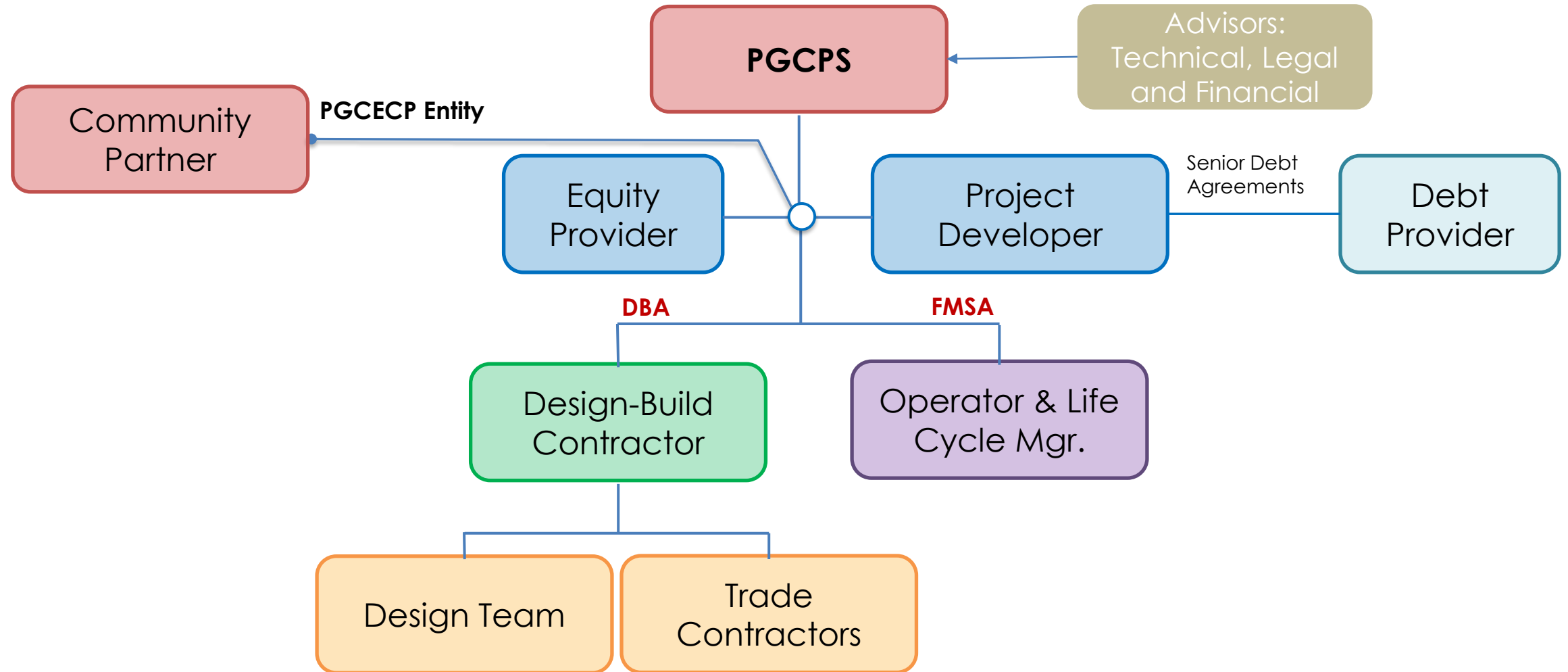
## Advanced Preparation:

- **WORKGROUP** – Elected Officials from County Council, School & County Administrators
- **CONSULTANT** – Advising Workgroup
- **CLARITY** – P3 “not a panacea,” acknowledged “trade-offs”
- **VALUE** - not least expensive option





# PGCPS's "P3" Partnership Arrangement:



# PGCPS' Perspective: Maintaining Control

How did PGCPS address concerns about a loss of control?

- Unambiguous Educational Specifications and Project Standards / Guidelines
- Weekly OAC Meetings in all phases
- Milestone document reviews
- 3<sup>rd</sup>-Party document Reviews
  - Independent Engineer Component to make certain designs are adhered to
- Independent Technical Advisory Team
  - Conduct Preliminary Diligence (Geotech, Traffic, Off-Site Improvements) reports
  - ALL Internal Diligence / Structuring prior to Procurement to streamline procurement process





# So,... Is “P3” for Me?

## Advice for Other Districts / Owners

- **“Never exchange PRIORITIES with SPEED”**
  - Pressure to “figure out as you go” – Instead, ... DECIDE
  - Return to FOUNDATIONS
- **ASK Questions; GET Clarity**
  - “Understandings” lead to complications
  - Commit to paper
- **Manage your risk / degree of involvement and control**
  - If you cannot bear to give up control, ... THEN DON'T!
  - Structure your engagement to suit your needs / tolerance for

# Will a “P3” deliver for Me?

Advice from an Architect for getting what you want:

- **The Obvious:** Has this Partner-team done this before ? Collaborative?
- **“AIR-TIGHT”** - are your Educational Specifications and Design Guidelines Current?
- **SERVING TWO MASTERS**
  - Architect works for the Developer – Beholden?
  - Can they “stand-up” for you?

The Questions you need to ask Yourself:

- What am I looking to achieve / Does this align with a P3 method?
- How involved do I wish to be / can I actually afford to be? Keep pace?



A photograph of a modern school building with a playground. In the foreground, a child is climbing a large, multi-colored geometric climbing structure (blue, orange, and grey) on a green rubber mat. The building in the background has large windows with colorful frames (blue, green, orange) and a grey facade. The playground area is paved with black and green rubber matting, and there are other children playing in the distance. The sky is blue with some clouds.

# BREAK OUT DISCUSSION

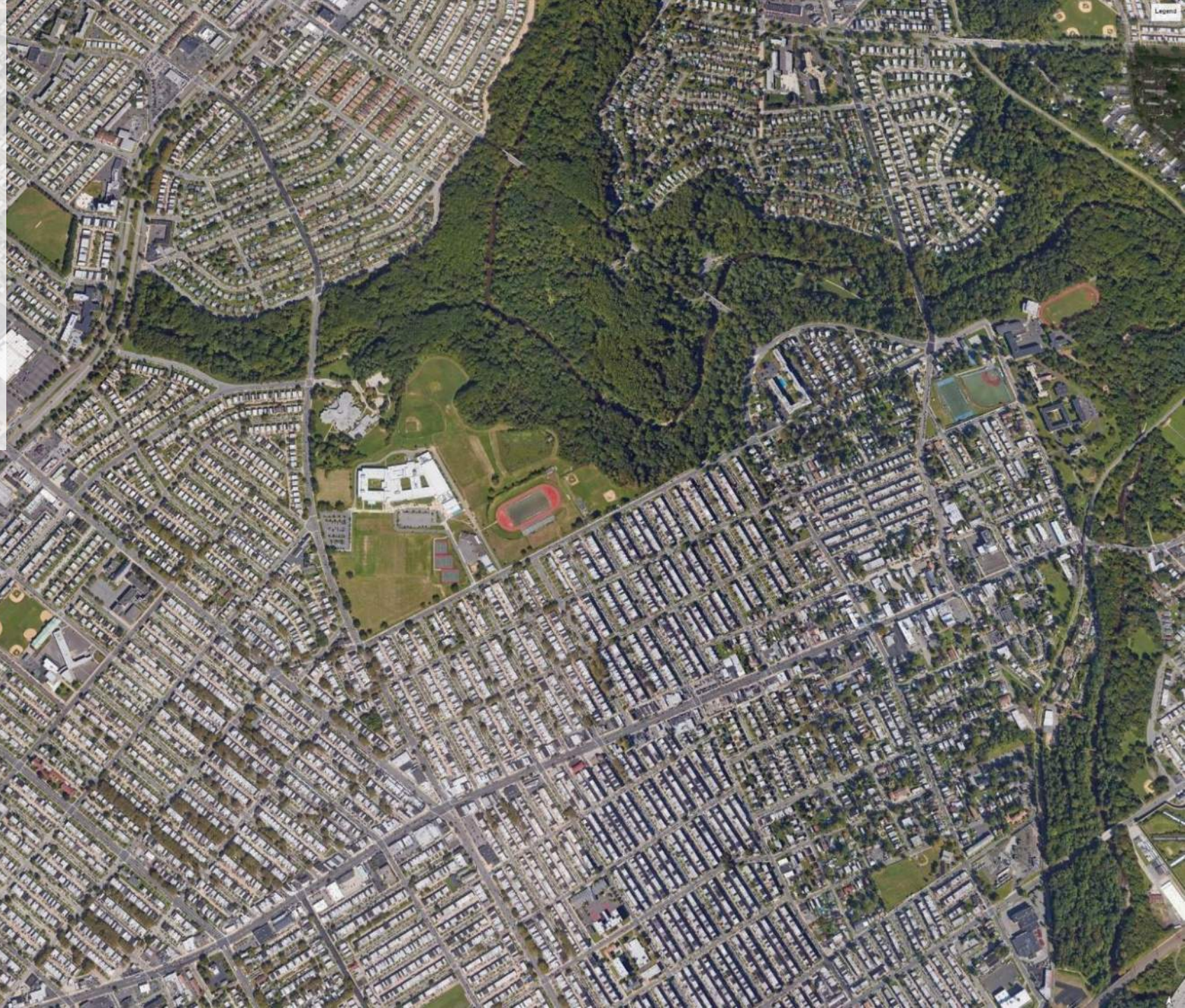






# Density. Compression.

For many children in urban communities, their lived experiences reside within vast, rigid expanses of gridded streets and zero lot-line structures. Learning offers little relief in industrial-era, one-size-fits-all, teacher-centric school designs.







BETWEEN EVERY TWO PINES IS A DOORWAY TO A  
NEW WORLD.

-JOHN MUIR





# Nature as Metaphor for Learning



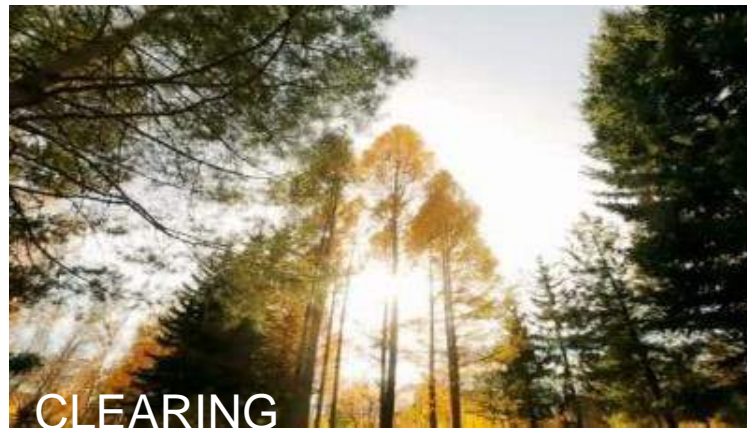
INSPIRED | Adjacent park offered a metaphor



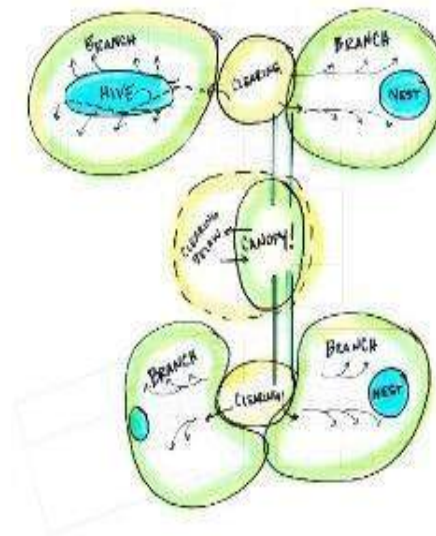
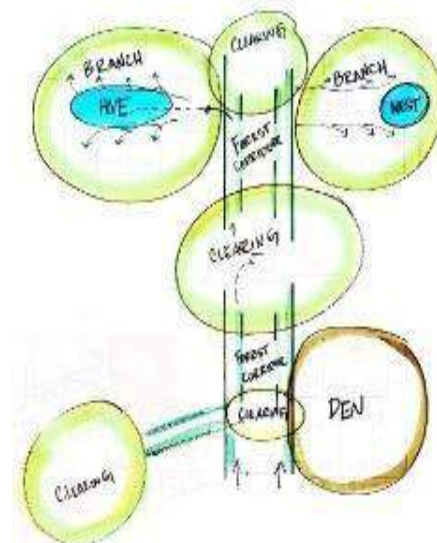
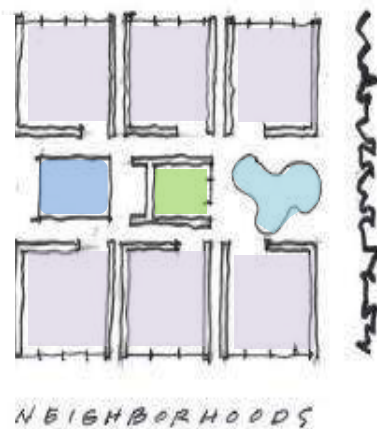
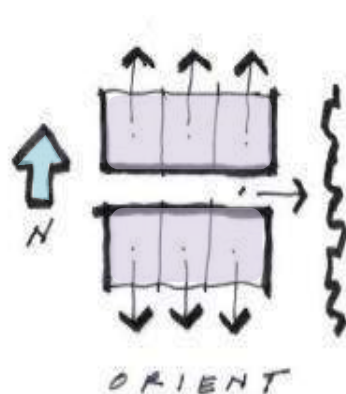
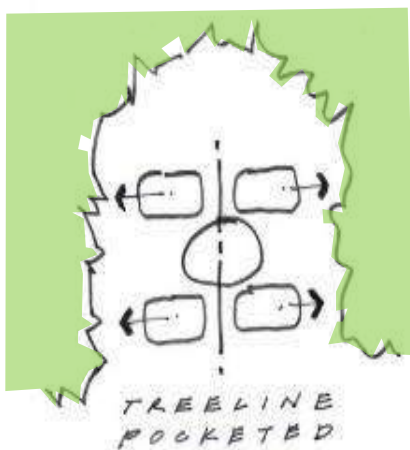
and antidote for the dense, urban experience



# Nature as Metaphor for Learning

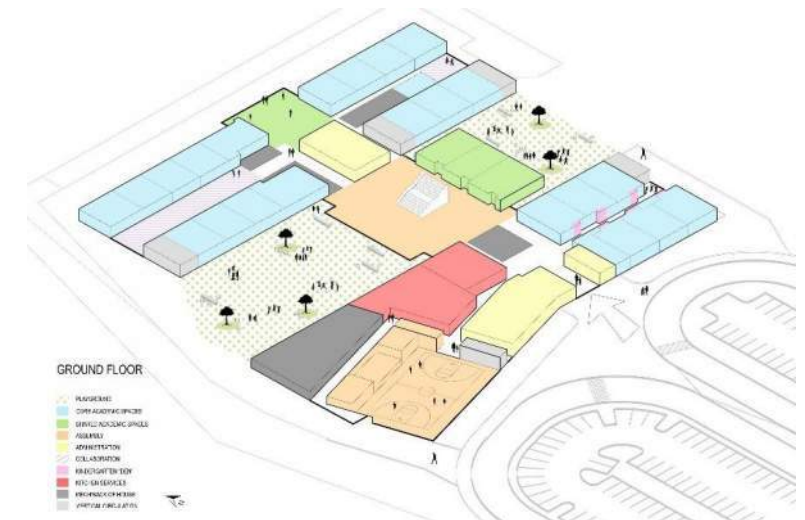
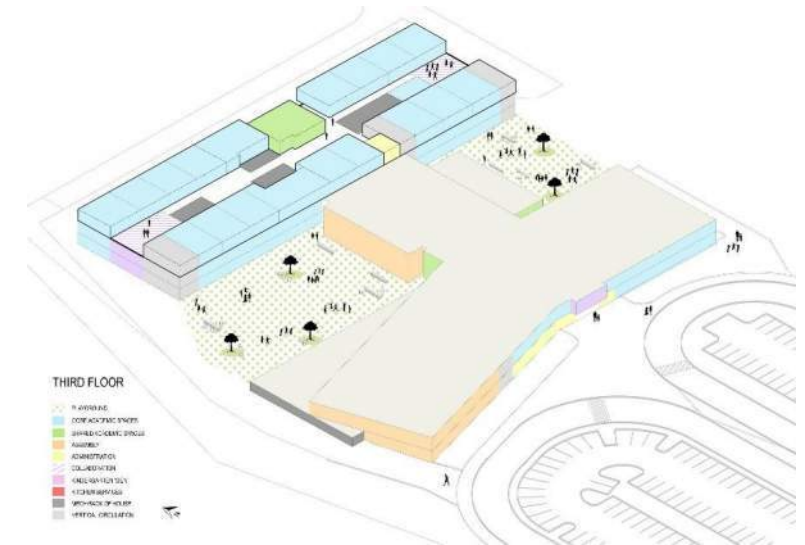
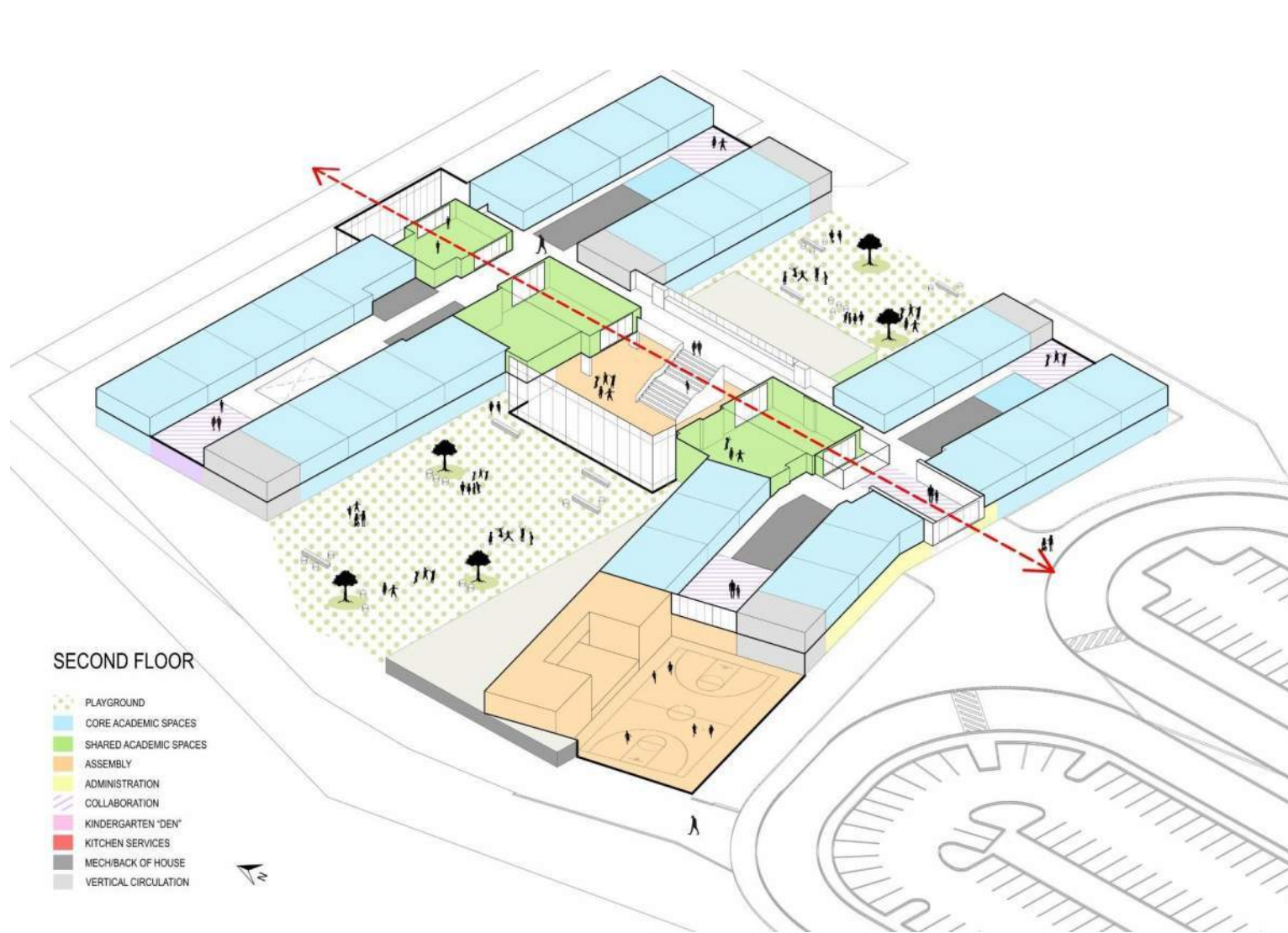


SCALED | ordered all spaces within the school

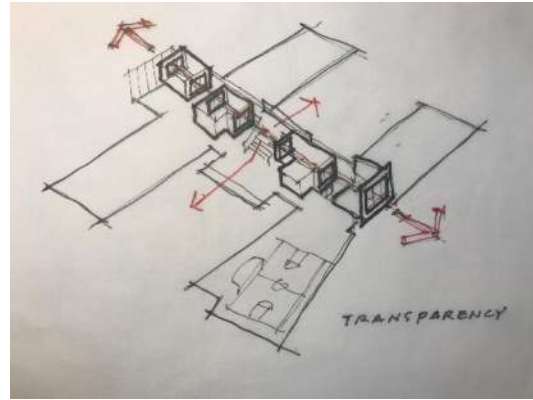
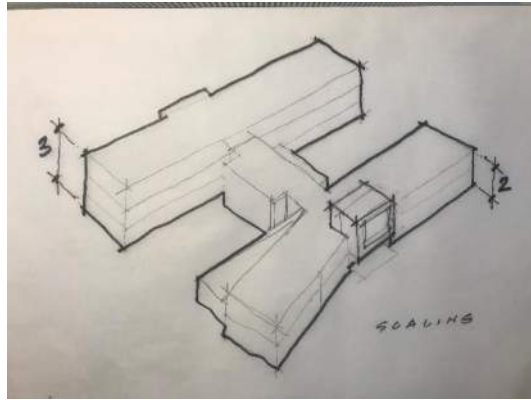




# Delivering Next Generation Learning









# Nature as Inspiration



CLEARING



# Learning on Display

The hovering 'storefronts' of the two CTE's spaces invite curiosity and promote the innovation and creativity within.



The open and distributed Media Center puts the books where the kids are.



# Nature As Inspiration



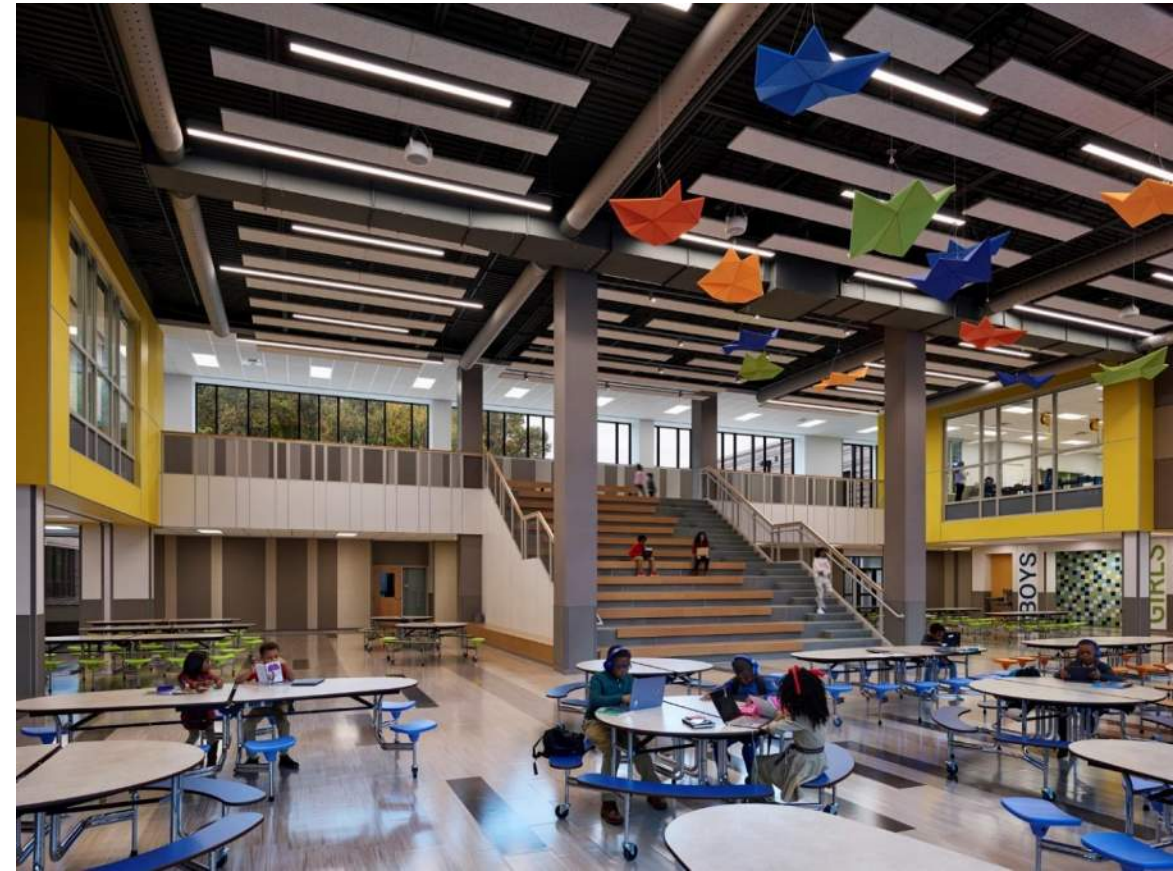
## Dappled Light

Mimicking the forest's overhead canopy is intended to signal a "Special Place"



## Taking Flight

Abstract acoustic birds soar to great heights





# Framing Views

Within the building and beyond extends awareness, suggests freedom, and provides an antidote to the prevailing sense of containment.





# Transparency

A core theme that extends the learning space, invites wonder and curiosity, promotes connection and community.





# Connection





# Creating Identity

Identify the entry to each learning neighborhood, and work consistently with exterior canopies, fire stair, and other building elements to provide way-finding.



## BRANCH



## Middle School Portal

# Nature as Metaphor for Learning



SOCIAL | scaled learning environments

KINDERGARTEN

Protection  
Intimate  
Secure  
Dependent



1ST THROUGH 5TH

Perspective  
Growth  
Secluded  
Sequence



6TH THROUGH 8TH

Collaboration  
Independence  
Structure  
Activity

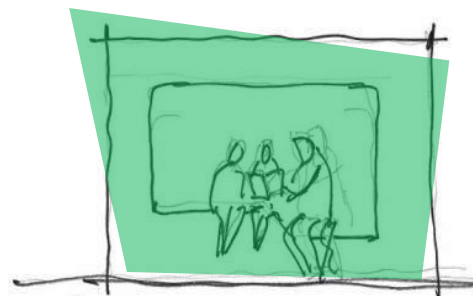




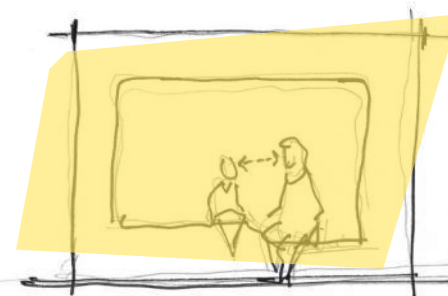
# Collaboration



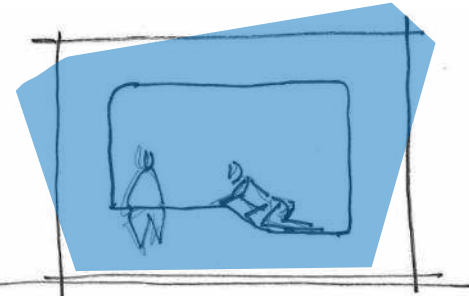
# DEN



1. Teacher & students in a directed reading lesson.



2. Teacher & student having a "re-set" conversation.



3. Students climbing, in active play.





NEST





HIVE



MS Learning Stair



# Organizing Arrival and Structuring Play





# Organizing Arrival and Structuring Play





# Discussion



THE SCHOOL DISTRICT OF  
PHILADELPHIA

