



## DELIVERY

# Getting the Most From Your Architect and Consultant Team

A California school-facilities owner's guide to consultant scopes, design coordination, decision authority, DSA interfaces, change control, performance management and certification.

### FOR DISTRICT LEADERS

Use this guide as a planning and discussion framework. State-program rules change over time, and project-specific legal, election, procurement, accounting, accessibility, and regulatory requirements should be confirmed with the district's appropriate professionals.

## What this guide helps you do

- Define owner authority and consultant deliverables before design begins.
- Require coordinated design before DSA submittal.
- Tie owner reviews, cost reconciliation and changes to planned decision points.
- Keep DSA construction oversight and certification responsibilities visible throughout the engagement.

## Start with the owner / design-professional relationship required by DSA

For California public-school construction under DSA jurisdiction, the design professional in general responsible charge is not just a consultant label. DSA states that the appropriately licensed architect or engineer in general responsible charge coordinates consultants, observes construction, interprets the drawings/specifications, administers required testing and inspection processes, and prepares construction change directives.

The district remains the owner. It must define priorities, make owner decisions, provide timely direction and ensure that the overall consultant team has clear scopes and interfaces.

### OFFICIAL CALIFORNIA SOURCE

**DSA - Construction Project Submittal**  
[Open official source](#)

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# Write consultant scopes around deliverables and interfaces

“Provide architectural services” is not a complete management plan. The agreement should identify what will be delivered, when, in what format, who coordinates it, what the district must provide and what triggers additional services.

| Programming / planning         | Who validates program, existing conditions, surveys, standards and budget assumptions?   | Approve program and scope baseline.                                       |
|--------------------------------|------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| Schematic / design development | What milestone deliverables, estimates and district reviews are required?                | Confirm scope, cost and major systems before design advances.             |
| Construction documents         | Who coordinates disciplines and checks completeness before DSA submittal?                | Authorize submittal only after coordinated owner review.                  |
| Agency review                  | Who tracks DSA/CDE comments and resubmittals?                                            | Review unresolved agency issues and schedule impacts.                     |
| Bidding / procurement          | Who prepares addenda, responds to bidder questions and reconciles scope?                 | Approve procurement package and budget.                                   |
| Construction administration    | Who handles RFIs, submittals, site observation, changes and documentation?               | Maintain decision/change authority and cost controls.                     |
| Closeout / certification       | Who collects verified reports, record documents and resolves certification deficiencies? | Do not release the team before certification responsibilities are closed. |

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## Require design coordination before DSA submittal

DSA states that projects must be completely designed and coordinated before submission for review. This is a powerful owner-management principle: do not use agency review as the coordination process. Require a coordinated quality-control review before submittal, including architecture, structural, civil, mechanical, electrical, fire/life safety, accessibility and other relevant disciplines.

### OFFICIAL CALIFORNIA SOURCE

**DSA - Start / Submit Construction Project**

[Open official source](#)

## Use a responsibility matrix

Make the gaps between consultants visible. Assign a lead, support, reviewer and approver for utilities, surveys, geotechnical information, technology/low voltage, accessibility, cost estimating, educational equipment, site phasing, commissioning, testing/inspection and agency comments.

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## **Bring the district into design decisions at planned milestones**

District review should happen before decisions become expensive to reverse. At each planned milestone, consolidate comments from facilities, maintenance, technology, safety/security, educational users and fiscal staff into one coordinated owner response.

Tie design milestones to cost reconciliation. If the estimate moves materially, require the team to identify whether the change came from scope growth, quantities, market pricing, escalation, design decisions or incomplete prior assumptions.

### **Keep value management tied to life-cycle performance**

When costs must be reduced, evaluate operational impact, maintainability, durability and educational function - not only first cost. A district standard that exists only in one employee's memory is hard for consultants to follow; document standards and update them as lessons are learned.

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## Understand construction-phase duties and DSA oversight

DSA provides oversight during construction, including approval of project inspectors, field visits, review of construction change documents, review of inspector/lab reports and recommendations related to project closeout/certification. The project inspector, design professionals and district all have defined roles in the process.

### OFFICIAL CALIFORNIA SOURCE

#### DSA - Construction Oversight

[Open official source](#)

### OFFICIAL CALIFORNIA SOURCE

#### DSA - Publications (including IR A-24)

[Open official source](#)

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## Control changes through one owner-authorized process

A consultant should not receive conflicting direction from facilities, a principal, maintenance, technology and administration. Establish the district point of contact and approval thresholds in writing.

For changes to DSA-approved documents, DSA explains that change orders must be written and signed by the architect/engineer in general responsible charge and the school district, then submitted to DSA for review/approval. Your internal change process should therefore coordinate technical approval, owner authorization, budget source and schedule impact before the change disappears into construction.

### OFFICIAL CALIFORNIA SOURCE

**DSA - Plan Review / Construction Changes**

[Open official source](#)

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## Manage performance while it can still be corrected

Missed deadlines, incomplete deliverables, repeated coordination errors, slow responses and uncontrolled additional-service requests should be addressed when a pattern appears. Compare performance to the contract, deliverable schedule and action log.

- Use recurring status reviews with specific due dates and owners.
- Require additional-service requests to identify the changed condition/request, contractual basis, fee and schedule impact before work proceeds, except under a defined emergency process.
- Maintain a decision log for material owner decisions.
- Track agency comments to closure instead of assuming a resubmittal means the issue is resolved.
- Evaluate consultant performance at major milestones and at closeout.

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## Keep certification in the consultant scope from day one

DSA emphasizes that project certification depends on documents and actions before, during and after construction. Closeout should therefore be written into consultant responsibilities at procurement, not added when construction is nearly complete.

DSA PR 13-02 and the Project Certification Guide identify required verified reports, inspection documentation and the certification process. The district should know who is responsible for each certification item and keep that responsibility matrix active throughout construction.

### OFFICIAL CALIFORNIA SOURCE

#### DSA - Project Certification Process

[Open official source](#)

### OFFICIAL CALIFORNIA SOURCE

#### DSA - Project Certification Guide

[Open official source](#)

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# Frequently Asked Questions

Practical questions district leaders commonly ask when moving from planning into implementation.

## **Who is the design professional in general responsible charge?**

DSA describes this as the architect or engineer responsible for coordinating consultants, observing construction, interpreting construction documents, administering testing/inspection processes and preparing construction change directives for the DSA project.

## **Should the district give direction directly to specialty consultants?**

Use the contract and agreed communication structure. The owner should have one controlled process for consultant direction so specialty consultants do not act on conflicting instructions.

## **How detailed should consultant scopes be?**

Detailed enough to identify deliverables, meetings, reviews, coordination tasks, agency responsibilities, schedule expectations, reimbursables, data/file formats and closeout/certification obligations.

## **Can the district rely on DSA review to catch design coordination problems?**

No. DSA states that projects should be completely designed and coordinated before submittal. Owner and consultant quality control should occur before agency review.

## **Who should track DSA comments?**

Assign a single accountable lead, usually through the design professional in general responsible charge, with an owner-visible log showing comment, responsible discipline, response, resubmittal and closure.

## **How should additional services be controlled?**

Require a written explanation of why the work is outside the original scope, the proposed fee, schedule effect and owner authorization before proceeding, except for defined emergency procedures.

## **What should be discussed at recurring project meetings?**

Decisions needed, schedule milestones, design/construction risks, cost status, pending changes, agency issues, RFIs/submittals where relevant, and action items with owners/due dates.

## **When should consultant performance be evaluated?**

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Throughout the engagement at meaningful milestones, not only at the end. Early correction protects the current project.

### **What is the district's role during construction oversight?**

The district remains the owner and participates in the DSA construction/certification process alongside the design professional, project inspector, testing laboratory and contractor. Refer to DSA construction-phase publications for project-specific duties.

### **When does certification planning begin?**

At project setup. DSA explicitly promotes the concept that certification starts when construction begins, and the documentation process should be managed throughout construction.

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# Questions to Ask Next

- Is district decision authority clearly defined?
- Do consultant agreements name actual deliverables and coordination responsibilities?
- Is the design coordinated before DSA submittal?
- Are owner reviews planned at milestones early enough to affect the design?
- Are cost estimates reconciled to the approved budget at those milestones?
- Is there one controlled change process with budget and schedule impacts?
- Do we track DSA comments and certification documents to closure?
- Are performance issues addressed while the project can still benefit?

## VALLEY OAK PROJECT ADVISORS

We help school districts translate facility needs into clear, financially responsible, and deliverable capital programs - from assessments and master planning through project delivery and closeout.

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# Official California Resources

Every link below goes directly to an official California state source from OPSC, the State Allocation Board, CDE, or DSA.

|     |                                                                                                                                                          |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| DSA | <b>Construction Project Submittal</b><br>Design professional in general responsible charge and coordination requirements.<br><a href="#">Open source</a> |
| DSA | <b>Construction Oversight</b><br>DSA oversight, project inspector and change-document review.<br><a href="#">Open source</a>                             |
| DSA | <b>Plan Review / Changes During Construction</b><br>Official guidance on DSA-approved documents and change orders.<br><a href="#">Open source</a>        |
| DSA | <b>Publications</b><br>Includes IR A-24, construction-phase duties, and other current interpretations/procedures.<br><a href="#">Open source</a>         |
| DSA | <b>Project Certification</b><br>Certification process, inspection card and post-construction requirements.<br><a href="#">Open source</a>                |
| DSA | <b>PR 13-02 Project Certification Process</b><br>Prescribed certification procedure and referenced forms.<br><a href="#">Open source</a>                 |
| DSA | <b>Project Certification Guide</b><br>Detailed certification and closeout guidance.<br><a href="#">Open source</a>                                       |
| CDE | <b>Plan Submittal Process</b><br>CDE educational specifications and plan review materials for applicable projects.<br><a href="#">Open source</a>        |

**Source note:** This guide intentionally limits external references to the California Office of Public School Construction (OPSC), State Allocation Board materials hosted by OPSC, the California Department of Education (CDE), and the Division of the State Architect (DSA).

Prepared September 2026. Always verify the current version of forms, regulations, and agency guidance before acting.