

BROWARD COUNTY PUBLIC SCHOOLS SMART PROGRAM QUARTERLY UPDATE

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INTRODUCTION

In June 2014, The School Board of Broward County, Florida unanimously approved a resolution requesting the Broward County Supervisor of Elections include a referendum on the November 4th ballot to approve the issuance of \$800 Million in general obligation bonds to modernize and improve the safety of outdated educational facilities and upgrade instructional technology. This resolution was in direct response to years of unsuccessful advocacy requesting the Florida legislature restore the capital millage rate and the current push in an ongoing effort to address the District's critical capital budget situation.

During school year 2012-13, BCPS launched a new Three-Year Strategic Plan. In brief, the plan highlights three strategic goals: High-Quality Instruction, Continuous Improvement, and Effective Communication. Never was there a more critical initiative to test the District's ability to effectively communicate than the general obligation bond (GOB) initiative. Thus, the District launched a six-month effort to educate all stakeholders about the GOB. The SMART initiative, as it was branded, was a collaborative effort to communicate the significant capital needs of the District, the adverse financial impact of the legislative reductions in capital millage, and the District's plan to utilize the additional \$800 Million in capital revenue should the community support the bond initiative.

On November 4 2014, the community spoke; and it was a resounding victory for the students of Broward County. The bond referendum passed, with 73.61% of the voters supporting the initiative. Further analysis of the voting results identified two distinguishing statistics that spoke to the success of the District's efforts to educate the community on the importance of this issue:

- Nearly as many people voted for the General Obligation Bond (GOB) initiative as did in the race for Florida governor (Governor: 469,519/GOB: 441,713). Typically, there is significant "drop off" between these issues.
- An analysis of the voting precincts indicates 576 of the 577 reporting precincts voted in favor of the GOB initiative. The lone precinct against the GOB initiative was precinct B001, where the final vote was 294 votes in favor of the GOB and 295 votes against. This suggests the GOB initiative had support from the entire county and appealed to all voter demographics.

During the first few months of the program, the District will initiate several activities to position itself to successfully execute the SMART Program. This included:

- Initiating Requests for Proposal (RFP) to identify strategic business partners to provide Owner's Representative and Cost/Program Control services on behalf of the District;
- Conducting a bond validation process through the State Attorney's Office to ensure the referendum process and intended use of bond proceeds was appropriate (The bond validation process was completed in March 2015);
- Amending the District's District Educational Facility Plan (DEFP) to infuse the anticipated bond proceeds and resulting prioritized projects within its five-year capital program;
- Initiating the School Choice Prioritization Project process with Year 1 identified schools and their respective SAC/SAF committees to identify project choices for the \$100,000 choice allocation;
- Awarding agreements to the identified Owner's Representative and Cost/Program Control strategic business partners; and
- Initiating the project charter and design criteria development process for initial projects.

OWNER'S REPRESENTATIVE AND COST/PROGRAM CONTROLS

The School Board of Broward County approved the agreements for both Owner's Representative and Cost and Program Controls Manager in August and September, 2015.

On August 18, 2015, The School Board approved a three-year agreement with Heery International for the execution of projects in the SMART Program. Heery has been assigned all of Year 1 work, as well as School Choice Enhancement projects.

Heery will provide program and project management expertise for the SMART Program, and will also enhance the District's efficiency by keeping the District current with the latest developments in management systems and practices. In addition, Heery will establish a central coordinated repository of data by implementing, maintaining, and upgrading management information systems appropriate for the District's projects, and will facilitate the efficient and effective use of information throughout the District's capital projects. Heery will also assist the District's senior management in establishing metrics that will identify areas where the Capital Improvement Program is functioning efficiently and areas that require improvement through benchmarking of best practices of project management on a local and national scale.

The Board also approved a three-year agreement with Atkins North America on September 16, 2015 as the Cost and Program Controls Manager. Atkins will manage all controls systems for all capital projects in the SMART Program, and will represent the District in identifying and resolving issues.

The Office of Facilities & Construction (OFC) will provide oversight of the two companies and will work closely in the management of the Bond Program.

E-BUILDER

E-Builder, a web-based capital program management and construction project management software, will be utilized to report on all SMART Program project schedules, expenditures, and Program key performance indicators (KPI). The e-Builder system will also serve to integrate data for the external web based interface, providing critical project information to all stakeholders. E-Builder will begin its implementation phase in November 2015, to be followed by program set-up and training. It is anticipated the system will be fully implemented in the spring of 2016.

Update:

A demonstration of e-Builder is expected to be given at the next BOC meeting.

The following is the schedule for the E-Builder implementation:

Phase/Task	Start	Finish
Kickoff	11/9/2015	11/25/2015
Kickoff	11/9/2015	11/25/2015
Discovery	12/2/2015	1/12/2016
Discovery - On-site	12/2/2015	1/12/2016
Design	2/2/2016	2/24/2016
PS - Account Design Requirements	2/2/2016	2/3/2016
PS - Workflow Design Requirements	2/11/2016	2/12/2016
Additional Design Session	2/18/2016	2/18/2016
Prepare Solution Documents	2/2/2016	2/24/2016
Configuration/Implementation	2/15/2016	3/10/2016
PS - Configuration	2/15/2016	3/4/2016
PS - Client UAT	3/10/2016	3/10/2016
Training	3/15/2016	4/15/2016
Adm Training 1/3	3/15/2016	3/17/2016
User Training 4/2	3/29/2016	4/1/2016
Support 1/4	4/12/2016	4/15/2016
Adoption	11/11/2015	4/29/2016
Adoption	3/25/2016	4/22/2016

PROJECT CHARTER MEETINGS

Introduced more recently as a critical step at the beginning stages of a project, Project Charter Meetings are being conducted for all of the SMART Program projects.

The purpose of the Project Charter Meeting is to review the Amended Adopted District Educational Facilities Plan and the 2014 Facility Condition Assessment information; clearly define the scope of the project; discuss different project delivery methods, with a goal to execute work as efficiently and effectively as possible; finalize Project Needs Statement and Objectives; develop Assumptions and Risks, Constraints and Dependencies for Site and Building Access, Scope, Materials, Equipment, including Academic Testing; identify any potential issues or concerns, and to establish high-level schedules, including frequency of meetings, reporting and responsibilities.

Project Charter meetings held this quarter: None

REQUESTS FOR PROPOSALS / QUALIFICATIONS

Three Requests for Proposals are currently active in the procurement stage. Proposals are due in late January for Design/Build services for Renovation Projects at Blanche Ely, Northeast and Stranahan High Schools. The project values are \$14,795,436, \$14,162,600, and \$16,004,650, respectively.

At the December 8, 2015 Regular School Board Meeting, approval was given to advertise for Requests for Qualifications for Professional Design Services for ten schools.

Additional approvals will be requested at the January 20, 2016 Regular School Board Meeting, which will include Term Contracts for both Architectural and Engineering Services that can be used for projects valued at under \$2M.

It is anticipated that a steady flow of projects will be presented at each School Board meeting for the next several years.

An evaluation of all project delivery methods continues and will be evaluated on a project by project basis.

In January, projects currently managed by URS will be transitioned to the Heery & Atkins Team.

OFC RELOCATION

The Office of Facilities and Construction will be relocating to the Rock Island Administration Center in mid-2016. Both Heery and Atkins will be co-located with OFC, allowing for day-to-day interaction and coordination on projects, maximizing the synergy that is necessary to execute the very important work of the SMART Program. Additionally, with the District's Building Department already housed at this location, further integration of processes can be realized for optimum success.

PROJECT CONTROLS STATUS

Rough Order of Magnitude cost estimates have been started on RFP projects in the procurement stage, including the projects at Northeast and Stranahan High Schools. Preparation of the overall SMART Program schedule has begun with the development of schedule templates as well as working with the Heery team to include the phasing of projects included in the bond program. The planning phase for the execution of a web based interface for SMART Program dashboard information is underway.

SCHOOL CHOICE ENHANCEMENT PROJECTS

The SMART Program includes school choice enhancement projects, which allow each school to direct \$100K towards schools enhancements selected by stakeholders at each campus. Currently, 82 Group 1 projects are in progress with the following status:

- Ready to procure -13**
- Voting process in progress - 5**
- Rejected Ballots - 4**
- Approved Scope -10**
- Pending OFC scope and budget approval - 2**
- Ballot being developed - 40**
- Non-Responsive - 8.**

Information on Group 2 projects are scheduled to go out to those schools in January 2016.

SMART PROGRAM ADMINISTRATIVE AND PROJECT EXPENDITURES

As in last quarters report, the first group of SMART Program projects are still in various stages of procurement. As such, the SMART Program expenditures for this period are again limited to the distribution of technology as separately reported to the Bond Oversight Committee.