

# BROWARD COUNTY PUBLIC SCHOOLS SMART PROGRAM QUARTERLY UPDATE - CONSTRUCTION

For the Bond Oversight Committee - May 2016

Quarter Ended  
March 31, 2016



**SAFETY**  
**MUSIC & ART**  
**ATHLETICS**  
**RENOVATION**  
**TECHNOLOGY**

#SMARTfutures



BROWARD COUNTY PUBLIC SCHOOLS



**100 YEARS**

Celebrating 100 Years of Educational Excellence!

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# INTRODUCTION

(Retained for Historical Reference – No Changes)

- 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4th ballot to approve the issuance of \$800 Million in general obligation bonds to modernize and improve the safety of outdated educational facilities and upgrade instructional technology.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.

# INTRODUCTION - Continued

(Retained for Historical Reference – No Changes)

- 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

(Retained for Historical Reference – No Changes)

- 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:**

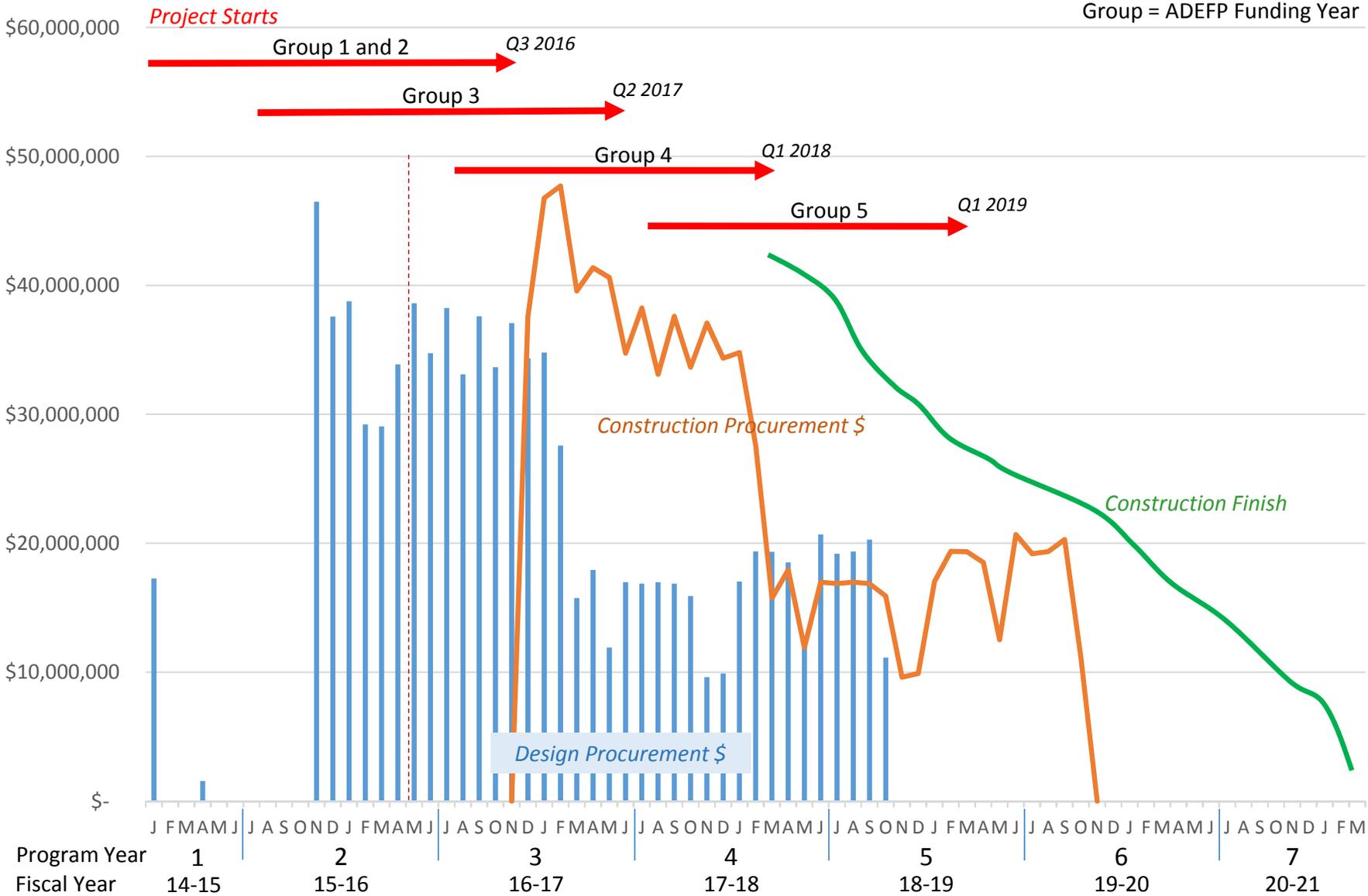
- The image to the right is the current schedule for the E-Builder implementation:

Phase/Task	Start	Finish
<b>Kickoff</b>	<b>11/9/2015</b>	<b>11/25/2015</b>
Kickoff	11/9/2015	11/25/2015
<b>Discovery</b>	<b>12/2/2015</b>	<b>1/12/2016</b>
Discovery - On-site	12/2/2015	1/12/2016
<b>Design</b>	<b>2/2/2016</b>	<b>4/13/2016</b>
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
Additional Design Session	2/29/2016	2/29/2016
Prepare Solution Documents	2/29/2016	4/13/2016
<b>Configuration/Implementation</b>	<b>2/15/2016</b>	<b>4/13/2016</b>
PS - Configuration	2/15/2016	3/4/2016
PS - Client UAT	3/11/2016	3/11/2016
PS - Configuration Updates	3/12/2016	4/13/2016
<b>Training</b>	<b>3/15/2016</b>	<b>5/27/2016</b>
Adm Training_Initial	3/15/2016	3/17/2016
Adm Training_Follow-up	4/14/2016	4/14/2016
Adm Training_Follow-up	4/20/2016	4/20/2016
User Training_Four (4) Days - Session #1	5/10/2016	5/13/2016
User Training_Four (4) Days - Session #2	5/24/2016	5/27/2016
<b>Adoption</b>	<b>4/22/2016</b>	<b>6/30/2016</b>
Adoption Call #1	4/22/2016	4/22/2016
Adoption Call #2	4/29/2016	4/29/2016
Adoption Call #3	5/6/2016	5/6/2016
Adoption Call #4	5/13/2016	5/13/2016
Adoption Call #5	5/20/2016	5/20/2016
Adoption Call #6	5/27/2016	5/27/2016
Account Management	6/27/2016	6/30/2016
<b>GO LIVE</b>	<b>5/13/2016</b>	<b>5/13/2016</b>
<b>Support</b>	<b>6/21/2016</b>	<b>6/24/2016</b>
Support_One (1) Day - Sessions #1 - 4	6/21/2016	6/24/2016

# PROJECT CHARTER MEETINGS

- Introduced in 2015 as a critical step at the beginning stages of a project, Project Charter Meetings will be 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; Project Charter Meetings are now scheduled to occur after the Design Professional has received their Authorization To Proceed (ATP) so they may participate in this critical meeting. Project Kick-Off Notices will begin to be issued in Q2 of 2016 that will notify Principals that the school's SMART Project is about to begin the Procurement process and that the Project Manager will be contacting them to coordinate a meeting that will include field verification of the Board approved scope.

# SCHEDULE



# OFFICE OF FACILITIES & CONSTRUCTION (OFC) PROJECT UPDATES

## Dollar Volume

• Planning		\$ 59.1M
• Design Procurement		\$ 130.9M
• Design		\$ 0.0M
• Construction Procurement		\$ 0.0M
• Construction		\$ 0.6M
• Completed / Warranty Phase		\$ 5.7M
• Completed / Closed		<u>\$ 7.3M</u>
	SUBTOTAL	\$ 203.6M
• Not Started		<u>\$ 698.1M</u>
	TOTAL	\$ 901.7M

# REQUESTS FOR PROPOSALS / QUALIFICATIONS

- Four (4) Requests for Qualifications were approved by the Board in January 2016
  1. Professional Architectural Services Continuing Contracts
  2. Professional MEP Services Continuing Contracts
  3. Professional Design Services for Deerfield Beach HS
  4. Professional Design Services for Miramar ES, Sea Castle, Annabel C Perry ES, Eagle Ridge ES, Tamarac ES and Ramblewood ES \*
- Two (2) Requests for Qualifications were approved by the Board in February 2016
  1. Professional Design Services for Coral Springs HS
  2. Professional Design Services for New River Middle, Whiddon-Rogers Education Center, Dillard 6-12, Plantation MS and Wingate Oaks Center \*

**\* The Office of the General Counsel has determined that the RFQ for multiple projects do not align with the membership composition requirements of QSEC as set forth in Board Policy 7003. RFQ will be terminated and individual project RFQ's will be issued following future Board approval.**

## REQUESTS FOR PROPOSALS / QUALIFICATIONS - Continued

- Six (6) Requests for Qualifications were approved by the Board in March 2016
  1. Professional Design Services for Sheridan Hills ES
  2. Professional Design Services for Piper HS
  3. Professional Design Services for Indian Ridge MS
  4. Professional Design Services for Manatee Bay ES
  5. Professional Design Services for Eagle Point ES
  6. Professional Design Services for Griffin ES
- A steady flow of projects continues to be presented at each School Board meeting
- Board approval of Professional Services Agreements (PSAs) will begin in April 2016

## OFFICE OF FACILITIES AND CONSTRUCTION RELOCATION

- The Office of Facilities and Construction (OFC) 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.
- Update: On schedule for a move to the new location starting July 5<sup>th</sup>, 2016.

# PROJECT CONTROLS STATUS

- Rough Order of Magnitude (Planning) cost estimates have been started RFQ as follows: 16-082F Atlantic Technical College, 16-083F Broadview ES, 16-084F Coconut Creek ES, 16-085F Cypress ES, 16-086F Lauderdale Lakes MS, 16-087F Maplewood ES, 16-088F Margate ES, 16-093F Oakridge ES/Pompano Beach MS/Pompano Beach ES, 16-102F Miramar ES/Sea Castle ES/Annabel C Perry ES/Eagle Ridge ES/Tamarac ES/Ramblewood ES, 16-103F Deerfield Beach HS, 16-111C Coral Springs HS, 16-112C New River MS/Whiddon-Rogers Education Center/Dillard 6-12/Plantation MS/Wingate Oaks Center, 16-124C Piper HS, 16-125C Sheridan Hills ES, 16-131C Eagle Point ES, 16-132C Manatee Bay ES, 16-133C Indian Ridge MS & 16-134C Griffin ES.
- The below listed soft costs are inclusive within the SMART Program project budgets:
  - Inflation
  - Portable Buildings and Structures
  - Architect and Engineering Fees
  - Program Management Fees
  - Building Permit/Review/Inspection Fees
  - Hazardous Material Contingency
  - Management G&A Expense
  - Advertising for Bids
  - Construction Contingency for Change Orders
  - Move and Relocation
  - Other Design Consultants
  - Material Testing
  - Project Contingency
  - ADA Contingency
  - Printing Bid Documents
  - Escalation
- Preparation of the overall SMART Program schedule continues implementation with the development of schedule templates based on the district Standard Operating Procedures for Design-Bid-Build and Design-Build project delivery methods. Construction Management at Risk is another delivery method under consideration. Implementation of project delivery methods will be discussed at the April 12, 2016 Board Workshop.
- An Executive Execution Plan for the SMART Program website interface is due to the district on April 8, 2016.

## 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.
- YEAR 1: 82 projects are in progress with the following status:
  - Ready to Procure - 24 (last reported as 13)
  - Voting Process in Progress - 5 (last reported as 5)
  - Rejected Ballots - 1 (last reported as 4)
  - Approved Scope & Budget Evaluation – 9 (last reported as 10)
  - Pending OFC scope and budget approval – None (last reported as 2)
  - Ballots Being Developed – 43 (last reported as 40)
  - Pending Response – None (last reported as 8)

## SCHOOL CHOICE ENHANCEMENT PROJECTS - Continued

- YEAR 2: 28 projects are in progress with the following status:
  - Ready to Procure - 1 (not included in prior report)
  - Voting Process in Progress – None (not included in prior report)
  - Rejected Ballots – None (not included in prior report)
  - Approved Scope & Budget Evaluation – None (not included in prior report)
  - Pending OFC scope and budget approval – None (not included in prior report)
  - Ballots Being Developed – 16 (last reported as 40)
  - Pending Response – 11 (last reported as 8)
- YEAR 3: 30 projects will commence in January 2017
- YEAR 4: 30 projects will commence in January 2018
- YEAR 5: 60 projects will commence in January 2019

## SMART PROGRAM ADMINISTRATIVE AND PROJECT EXPENDITURES

- There are currently twenty (21) financially active Office of Facilities and Construction (OFC) SMART Program projects
- Total current budget for these active projects is \$91,321,813
- Total expenditures and commitments for these active projects is \$3,165,056
- Total remaining balance for these active projects is \$88,156,757