

Date: January 3, 2023
Title: CBRE Heery CLOC Update Report
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Report

This report is being written at the request of the Citizen-Led Oversight Committee (CLOC) to provide a brief report on the status of CBRE Heery and their program/project management consulting services for Beaufort County School District (BCSD).

Two bond referendum votes were approved by voters in Beaufort County in November 2019 – providing \$344M for improving school facilities. Through a competitive procurement process, CBRE Heery was selected to provide program/project management services to assist BCSD in managing the 2019 Bond Referendum and Board-approved 8% capital projects.

In February 2020, CBRE Heery and BCSD executed a contract for the work. The contract states that the agreement would be a multi-year contract, starting with one year which could be extended four more years in one-year increments. Beyond that, the contract could be extended two more years upon the approval of the Superintendent. In April 2020, Amendment 1 was executed for Year 1 (2020), and amendments for each subsequent year have been negotiated and approved in a similar fashion.

The following table summarizes the fees (labor and expenses) paid to CBRE Heery:

	Contract Budget	Actual/Projected	Savings
Year 1 (2020) Actual	\$1,287,339	\$1,108,712	\$178,626
Year 2 (2021) Actual	\$1,768,684	\$1,660,546	\$108,138
Year 3 (2022) Projected	\$1,782,099	\$1,671,474	\$110,625
Year 4 (2023) Projected	\$1,763,301	\$1,755,753	\$7,548
Summary	\$6,601,422	\$6,196,485	\$404,937

The current staffing includes five full-time staff members that all work in an integrated fashion with BCSD existing staff. Those staff positions are:

- Program Manager
- Two Project Managers
- Document Controls / Administrative
- Finance / Procurement Coordinator

Also, there are seven staff members who provide services on a part-time, as needed basis as follows.

- Program Director
- Deputy Program Manager
- IT Project Manager
- IT Design Manager
- Scheduler
- Estimator
- Database Specialist

It is anticipated that future consulting services are needed – to help finish the 2019 bond projects into 2024 (Year 5). This will place the completion of the referendum projects one year later than originally anticipated. The contract allows for this additional year, but this was not included in the original CBRE Heery four-year fee estimate. A proposal will need to be presented for 2024 by Q4 2023 to be approved by the Board of Education.