

Date: March 31, 2023

Title: CBRE Heery Contact Summary Update

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Report

This report is provided in response to the Citizen-Led Oversight Committee (CLOC) request on January 11, 2023 to provide quarterly updates for the CBRE Heery program/project management consulting services for Beaufort County School District (BCSD).

The following table summarizes the fees (labor and expenses) actually paid to CBRE Heery for Year 1 through Year 3. Information show in the table for Year 4 includes actual fees through February 28, 2023 and a projected total for this year:

	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) Actual	\$1,782,099	\$1,579,335	\$202,764
Year 4 (2023) Actual/Projected	\$1,763,301	\$1,731,633	\$31,668
	\$6,601,422	\$6,080,227	\$521,195

Staffing continues to include 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

There are also seven staff members that continue to 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

Future consulting services for 2024 (Year 5) will be needed to finish the 2019 bond projects. The contract allows for the continuation of CBRE Heery services. A fee proposal will be presented for CBRE Heery 2024 services in Q4 2023 to be approved by the Board of Education.