

**Date:** June 30, 2023

**Title:** Turner & Townsend Heery, LLC CLOC Q2 2023 Update Report

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## **Report**

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This report is being written at the request of the Citizen-Led Oversight Committee (CLOC) to provide a brief quarterly update report on the status of Turner & Townsend 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, now Turner & Townsend 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 Turner & Townsend Heery:

	<b>Contract Budget</b>	<b>Actual/Projected</b>	<b>Savings</b>
<b>Year 1 (2020) Actual</b>	\$1,287,339	\$1,108,712	\$178,626
<b>Year 2 (2021) Actual</b>	\$1,768,684	\$1,660,546	\$108,138
<b>Year 3 (2022) Actual</b>	\$1,782,099	\$1,579,335	\$202,764
<b>Year 4 (2023) Actual/Projected</b>	\$1,763,301	\$1,722,396	\$40,905
	<b>\$6,601,422</b>	<b>\$6,070,989</b>	<b>\$530,433</b>

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 (revised by Amend. No. 10 to Financial Controls Manager)

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

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

It is anticipated that future consulting services are needed – to help finish the remaining 2019 bond projects in 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 Not to Exceed (NTE) four-year fee proposal. A proposal will be presented for our 2024 services in Q4 2023 to be approved by the Board of Education. Amendment No. 8 was executed on February 13, 2023 for an amount of \$63,200 to provide estimating services for the future bond referendum. Amendment No. 9 is being executed to change the name on the contract from CBRE Heery, Inc. to Turner & Townsend Heery, LLC. Amendment No. 10 is also being executed to revise the Finance Procurement Coordinator to be the Finance Controls Manager and to increase the rate for that position from \$88.38/hr to \$96.38/hr.