

**Date:** February 8, 2024

**Title:** Turner & Townsend Heery, LLC CLOC Q4 2023 Update Report

**By:** David Waggoner, Turner & Townsend Heery

## **Report**

---

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</b>	\$1,763,301	\$1,687,619	\$75,682
	<b>\$6,601,422</b>	<b>\$6,036,222</b>	<b>\$565,200</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
- 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

A proposal from Turner & Townsend Heery was presented in Q4 2023 requested by the district for services occurring in January through March of 2024 to continue services for projects in the 2019 Bond Program. Funding for these services would come from fee savings in years 1-4 shown above. This was approved by the Board of Education on November 21, 2023, and Amendment No. 11 has been executed. Concurrently, start-up services for the 2023 Bond Program have also been requested by the district from Turner & Townsend Heery occurring in January through March of 2024. A proposal has been submitted and approved, and Amendment No. 12 is being routed for signatures. A Request for Proposals (RFP) was issued for Capital Program Management and Coordination Services by the district on October 20, 2023. Proposals were due on January 17, 2024 and are currently under review.