



Hindsight Report Presentation to Citizen-Led Oversight Committee (CLOC)

(DESC Media Center and Via Zoom)
October 09, 2024

Pledge of Allegiance





CLOC's Mission

Independently monitor all building projects, schedules, budgets, and expenditures from the Beaufort County School District's Nov. 2023 Bond Referendum, thereby ensuring proper use of Beaufort County taxpayer funds and superior facilities for Beaufort County students.

PRESENTATION

AGENDA



1. Pledge of Allegiance
2. Public Comments
3. Approval of Draft 2023 & 2019 Bond Referendum CLOC Meeting Minutes from September 11, 2024
4. Hindsight Reports
 - A. New Construction
 - B. Major Renovations
 - C. Minor Renovations/Limited scope (Technology/Infrastructure, Safety/Security, HVAC, etc.)
5. Executive Summary of Yearly Lessons Learned
 - A. 2020
 - B. 2021
 - C. 2022
 - D. 2023

4. Hindsight Reports



Hindsight Reports



Project Types

- A. New Construction
- B. Major Renovations
- C. Minor Renovations/Limited scope (Technology/Infrastructure, Safety/Security, HVAC, etc.)

Hindsight Reports



A. New Construction

1. May River High School – Classroom Wing Additions
2. River Ridge Academy – Classroom Wing Additions
3. Robert Smalls Leadership Academy – New Facility

Hindsight Reports



A. New Construction

- Issues:
 - Manufacturing/shipment delays
 - Limited subcontractors
 - Readiness of designs for construction once Referendum is approved
 - Permitting
 - Programming expectations
 - Clear scope
 - Utility coordination
 - Gaps in information from 100% construction documents
- Solutions:
 - Early release packages to expedite the procurement and receipt of long lead items
 - Work with CM's to put on outreach events that notify and inform potential subcontractors about participation in future projects
 - Allowing advanced designs to proceed to enable projects to be ready for construction once Referendum is approved
 - Working with Designers and CM's to understand current issues with permitting and bringing potential issues to the attention of the local agencies to prepare them to expedite permits

Hindsight Reports



A. New Construction (Cont.)

- Issues:
 - Manufacturing/shipment delays
 - Subcontractor labor shortages
 - Readiness of designs for construction once Referendum is approved
 - Permitting
 - Programming expectations
 - Clear scope
 - Utility coordination
 - Gaps in information from 100% construction documents
- Solutions:
 - Involvement of stakeholders during programming discussions to ensure everyone understands the new facilities programming
 - Implementation of project charters to clarify scope of project and review preliminary schedules
 - Collaboration with utility providers to coordinate utilities with new construction, preferably at the Design Development (DD) stage
 - Conformance set from design team to bridge the gap in information from 100% CD's through GMP award

Hindsight Reports



B. Major Renovations

1. Battery Creek High School
2. Beaufort Elementary School
3. Hilton Head Island Middle School

Hindsight Reports



B. Major Renovations

- Issues:
 - Coordination between occupants and construction team
 - Clear scope
 - Field verifications from design team
 - CM preconstruction involvement and better estimates during design phase
 - Concerns with hazardous materials
- Solutions:
 - Communication/meetings with administrative staff and school staff through the design phase and construction phase to gain full understanding of occupancy needs and how construction will progress through major renovations; Phasing coordination
 - Development of design narratives by the design team prior to start of schematic designs and facilitating buy-in from stakeholders through the implementation of a project charter to have clear scope expectations
 - Field verifications from designers during the design to ensure all conditions are addressed in plans to avoid disruptions during construction due to discrepancies

Hindsight Reports



B. Major Renovations (Cont.)

- Issues:

- Coordination between occupants and construction team
- Clear scope
- Field verifications from design team
- CM preconstruction involvement and better estimates during design phase
- Concerns with hazardous materials

- Solutions (Cont.):

- Including sufficient time during the design phase for pricing of design documents at each milestone to receive updated cost estimates from subcontractors bidding the jobs; Allowing sufficient time for cost reviews; Limiting the use of allowances on scope packages for which the CM does not receive subcontractor estimates on.
- Conduct materials testing on existing facilities during the design phase to identify areas of potential concern that could impact cost and schedule

Hindsight Reports



C. Minor Renovations/Limited Scope

1. Beaufort High School
2. Beaufort Middle School
3. Bluffton Early Childhood Center
4. Bluffton Elementary School
5. Bluffton High School
6. Bluffton Middle School
7. Broad River Elementary School
8. Coosa Elementary School
9. H.E. McCracken Middle School
10. Hilton Head Island Early Childhood Center
11. Hilton Head Island Elementary School
12. Hilton Head Island High School
13. Hilton Head Island School for the Creative Arts
14. James J. Davis Early Childhood Center
15. Joseph S. Shanklin Elementary School
16. Lady's Island Elementary School
17. Lady's Island Middle School
18. May River High School
19. M.C. Riley Early Childhood Center
20. M.C. Riley Elementary School
21. Mossy Oaks Elementary School
22. Okatie Elementary School
23. Port Royal Elementary School
24. Pritchardville Elementary School
25. Red Cedar Elementary School
26. River Ridge Academy
27. St. Helena Elementary School
28. Whale Branch Early College High School
29. Whale Branch Elementary School
30. Whale Branch Middle School

Hindsight Reports



C. Minor Renovation/Limited Scope

- Issues:
 - Communication
 - Clear scope
 - Field verifications
 - Subject matter expert involvement
 - Acceptance of end product
 - Equity
 - Document/closeout management
 - Limited subcontractors
- Solutions:
 - Communication/meetings with stakeholders involved in the development of systems being implemented; Stakeholder identification/involvement from Day One
 - Implementation of project charters to clarify scope of project and review preliminary schedules
 - Pilot program implementation to understand what it will take to execute the projects/program
 - Field verifications from designers during the design to ensure all conditions are addressed in plans to avoid disruptions during construction due to discrepancies

Hindsight Reports



C. Minor Renovation/Limited Scope

- Issues:
 - Communication
 - Clear scope
 - Field verifications
 - Subject matter expert involvement
 - Acceptance of end product
 - Equity
 - Document/closeout management
 - Limited subcontractors
- Solutions:
 - Involvement of professionals such as IT consultants to manage the design, procurement, and construction/implementation of systems
 - Implementation of program controls/checklists to clearly identify goals that will enable acceptance of the end product
 - Assist District with RFQ issuance to hire a designer to prepare design standards and guidelines to ensure there is equity across the district facilities
 - Implementation of a Project Management Information System (PMIS) to organize documents, record receipt of deliverables, implement processes, and manage projects

Hindsight Reports



C. Minor Renovation/Limited Scope

- Issues:
 - Communication
 - Clear scope
 - Field verifications
 - Subject matter expert involvement
 - Acceptance of end product
 - Equity
 - Document/closeout management
 - Limited subcontractors
- Solutions (Cont.):
 - Improve sequencing of subcontractor labor to avoid running into schedule conflicts when labor shortages may impact the outcome of the project
 - Create work packages for similar scopes to be able to get better participation from subcontractors as well as ensure better pricing

5. Executive Summary of Yearly Lessons Learned



Executive Summary of Yearly Lessons Learned



A. October 2020 (Operations Dept. and Project Mgmt. Staff)

- Start design phase earlier
- Development of technology requirements/standards
- Improved communications with principals
- Provide vendor training on invoicing/payment requirements; and
- Commence project closeout process earlier

Executive Summary of Yearly Lessons Learned



B. September 2021 (Operations Dept. and Project Mgmt. Staff)

- Produce design narrative/scope validation reports prior to commencing design
- Encourage use of project charter meetings to better inform stakeholders of project scope and schedule
- Require designers to perform additional field verifications
- CM firms to improve on pre-construction services
- Develop technology network cutover checklists; and
- Update technology design guidelines

Executive Summary of Yearly Lessons Learned



C. August 2022 (Operations Dept. and Project Mgmt. Staff)

- Facilities department liaison for academic staff is very beneficial
- Investigate advantages of a PMIS (Project Management Information System)
- Introduce future AIA agreement revisions to hold designers accountable for better documentation, construction administration, and project closeout services
- Improve documentation for design review meetings and introduce use of checklists
- Increase IT department participation in reviews of design documents and specifications
- Order long lead items ASAP
- Develop digital storage for close-out documents

Executive Summary of Yearly Lessons Learned



D. September 2023 (Operations Dept. and Project Mgmt. Staff)

- Increase level of detail/milestones for design schedules including time for progress reviews of each design phase
- Implementation of future QC/QA requirements for designers and contractors
- Ensure IT department perform progress design reviews
- Develop a responsibility matrix for project team participants
- Require designers to distribute a log of all design review comments and provide written responses on how comment has been addressed and references to sheet number's and/or details
- Summer timeframes have gotten shorter, be prepared for shorter Summers
- Development of RFP for PMIS

Executive Summary of Yearly Lessons Learned



E. October 2023 (IT Dept. Staff)

- Increase communications with IT department staff (scopes, budgets, schedules)
- IT department suggests having an IT consulting firm to assist in working with project design teams and monitor construction work for IT department
- Require PM and IT design manager to perform progress design reviews with IT department staff and ensure designers addresses review comments
- Provide more uniformity of system designs and quality standards
- More IT designers are needed to work with designers
- Implementation of future QC/QA requirements for designers and contractors
- Better commissioning and documentation/checklists are needed



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