



New Member Training for the Citizen's Led Oversight Committee (CLOC)

October 9, 2024
Beaufort, South Carolina

TRAINING AGENDA



- BCSD Fun Facts
- Overview of Operations Department
- Facilities Master Plan
- 8% Capital Improvement Plan Funds
- Referendum History – successful process
- Project Manager – School Assignment
- Process workflow – that graph they wanted to discuss

BCSD Facts

Dr. Rodriguez named 2025 SC Superintendent of the Year by the SC Association of School Administrators (SCASA) and a top 25 Superintendent to Watch by the National School Public Relations Association (NSPRA)

In 2023, BCSD implemented unprecedented salary increases for teachers moving BCSD's ranking from 53rd to 1st in the state for starting teacher salary.

BCSD continues to maintain a Aa1 credit rating from Moody's Investors Service. This outstanding rating allows the District and taxpayers the benefit of low interest rates on school bonds

Who is Operations and What Do We Do?

Our department's objective is to ensure that our facilities align seamlessly with the educational needs of our students and that the District's assets are

- Safe
- Properly maintained



**Facilities Planning &
Construction**



Maintenance



Custodial



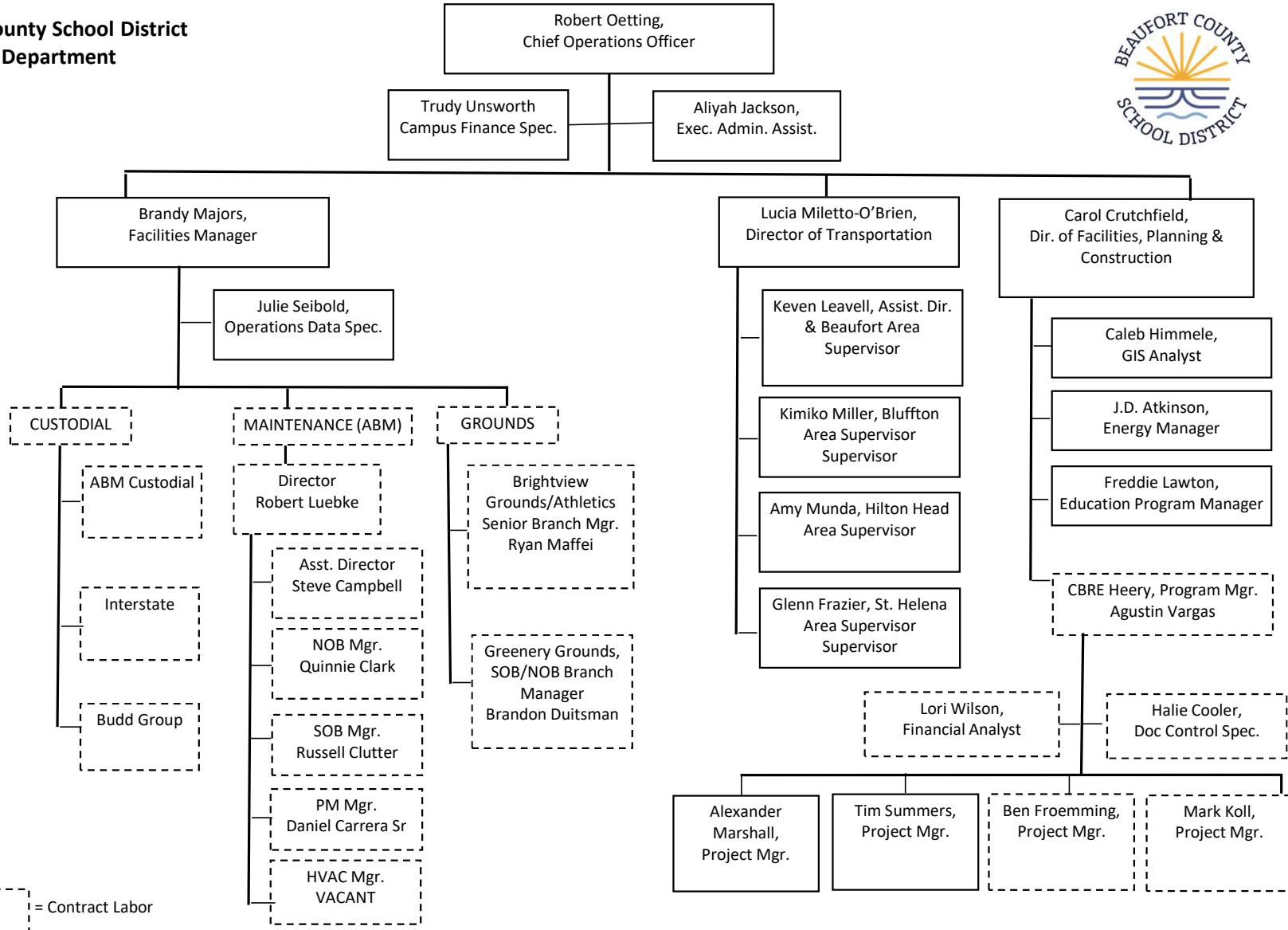
Grounds



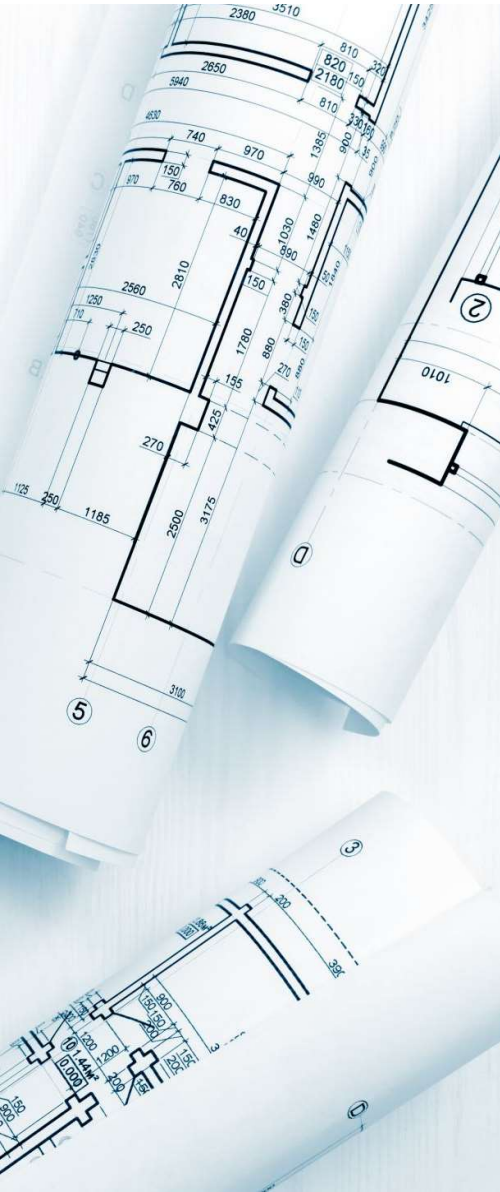
Transportation

**Beaufort County School District
Operations Department
2024-2025**

Updated
10/2/2024



= Contract Labor



Who is Operations and What Do We Do?

- Operations organization
- Facilities
- Planning
- Construction – 8% Projects and Referendum Projects
- Facilities Management GIS
- Successes of the 2019 & 2023 Bond Referendum
- Citizen Engagement – CPRC & CLOC
- Energy Management
- Indoor Air Quality
- Radios / BDA
- Facilities Use – Rentals
- Contracted Services
 - Maintenance
 - Custodial
 - Grounds
 - Roof Maintenance and Repairs
- Transportation

What Does Operations Do Well?

Community Engagement: The department actively involves the community at multiple levels in the planning process for school facilities, employing mechanisms such as Community Project Review Committees (CPRC), Citizens Led Oversight Committee (CLOC), and design reviews with School SIC, ensuring that local voices are heard and valued.

Transparency and Accountability: There is a commitment to accountability to the community, exemplified by the annual publication of the Facilities Master Plan book, which provides clear and transparent reporting on the department's activities and progress. The CLOC and CPRC are public meetings with all minutes, presentations and videos online.

Construction Management: Leveraging Comprehensive Facility Planning, BCSD has successfully constructed new facilities to accommodate the rapid growth in one of South Carolina's fastest-growing regions. Delivering projects on time and under budget.

Highly Competent Team: The Operations Department boasts a professional, efficient, and effective staff dedicated to managing facility-related tasks.

What Does Operations Do Well?

Reliable Planning: The department consistently offers trusted and dependable projections for facility planning, ensuring that long-term strategies align with community needs and expectations.

Safe transportation: Each year, we safely transport 10,946 students to and from school, covering a total distance of 1,530,000 miles.

Contracted services: To optimize efficiency, affordability, and accountability, we contract out our Custodial, Maintenance, and Ground services.

Cutting-edge building safety systems: Our community is focused on safety and security - we are focused on safety and security.

BEAUFORT COUNTY SCHOOL DISTRICT

Beaufort, South Carolina

FACILITIES MASTER PLAN



ANNUAL UPDATE

January 2024

Frank Rodriguez, Ph.D., Superintendent • www.beaufortschools.net

- ❑ Facilities Master Plan (rolling 5-year plan)
- ❑ Programmatic changes to schools
- ❑ Enrollment Projections through careful computer mapping of resident students over time
- ❑ Changes in Student Assignment – attendance zone changes resulting from enrollment changes or opening of new schools
- ❑ Involving the Community and school in planning
- ❑ Energy Management and Indoor Air Quality
- ❑ Capital Improvement (8%) Projects funded annually
- ❑ 2019 & 2023 Bond Referendum Projects

Funding Facilities Needs

There are only 3 ways to fund capital improvement projects in South Carolina:

1. A Referendum passed by a majority of the voters for specific designated capital projects
2. 8% Funding – which allows for the District to borrow up to 8% of the assessed value of the property in the county
3. Impact fees – assessed for areas experiencing growth to finance the impact the developments create on support services and facilities. Can be used for schools, fire departments, etc.

8% PROJECTS CAPITAL IMPROVEMENT PROJECTS (CIP)

We employ a strategic approach to life cycle replacement planning, which enables us to proactively prepare for the replacement of a wide range of systems in both our schools and support buildings. A Facility Condition Assessment (FCA) conducted in 2022, rigorously examined the age and condition of various systems, and guides which projects are prioritized for funding

- ✓ Mechanical – including HVAC equipment
- ✓ Elevators
- ✓ Electrical / Lighting
- ✓ Doors – interior and exterior
- ✓ Building Envelope
 - ✓ Windows
 - ✓ Exterior Walls
 - ✓ Roofs
- ✓ Floors / Ceilings
- ✓ Plumbing

- ✓ Interior Walls – painting schedules
- ✓ Safety/security features such as cameras, access control, and the infrastructure to support these technologies
- ✓ Athletic fields, playgrounds, and other support structures such as tennis courts and tracks
- ✓ Gym floor resurfacing and replacements
- ✓ Playgrounds & Athletic facilities
- ✓ Band Equipment & Uniforms
- ✓ Small scale renovations

8% PROJECTS CAPITAL IMPROVEMENT PROJECTS (CIP)

Funding Year	Academic Support	Asset Preservation	District	District Technology	Life Safety / Security	Standardization/ Equity	Grand Total
FY26 8%	\$1,297,000.00	\$18,634,000.00	\$9,682,000.00	\$8,854,000.00	\$5,105,000.00		\$43,572,000.00
FY27 8%	\$4,032,000.00	\$54,257,000.00	\$637,000.00	\$11,634,000.00		\$1,213,000.00	\$71,773,000.00
FY28 8%	\$10,949,000.00	\$47,932,000.00	\$669,000.00	\$8,305,000.00		\$1,953,000.00	\$69,808,000.00
FY29 8%	\$4,126,000.00	\$27,378,000.00	\$289,000.00	\$9,127,000.00			\$40,920,000.00
FY30 8%	\$7,541,000.00	\$14,857,000.00	\$224,000.00	\$7,931,000.00		\$1,300,000.00	\$31,853,000.00
Grand Total	\$27,945,000.00	\$163,058,000.00	\$11,501,000.00	\$45,851,000.00	\$5,105,000.00	\$4,466,000.00	\$257,926,000.00

Referendum - History



BCSD went 11 years without successful passage of a bond referendum (2008-2019)



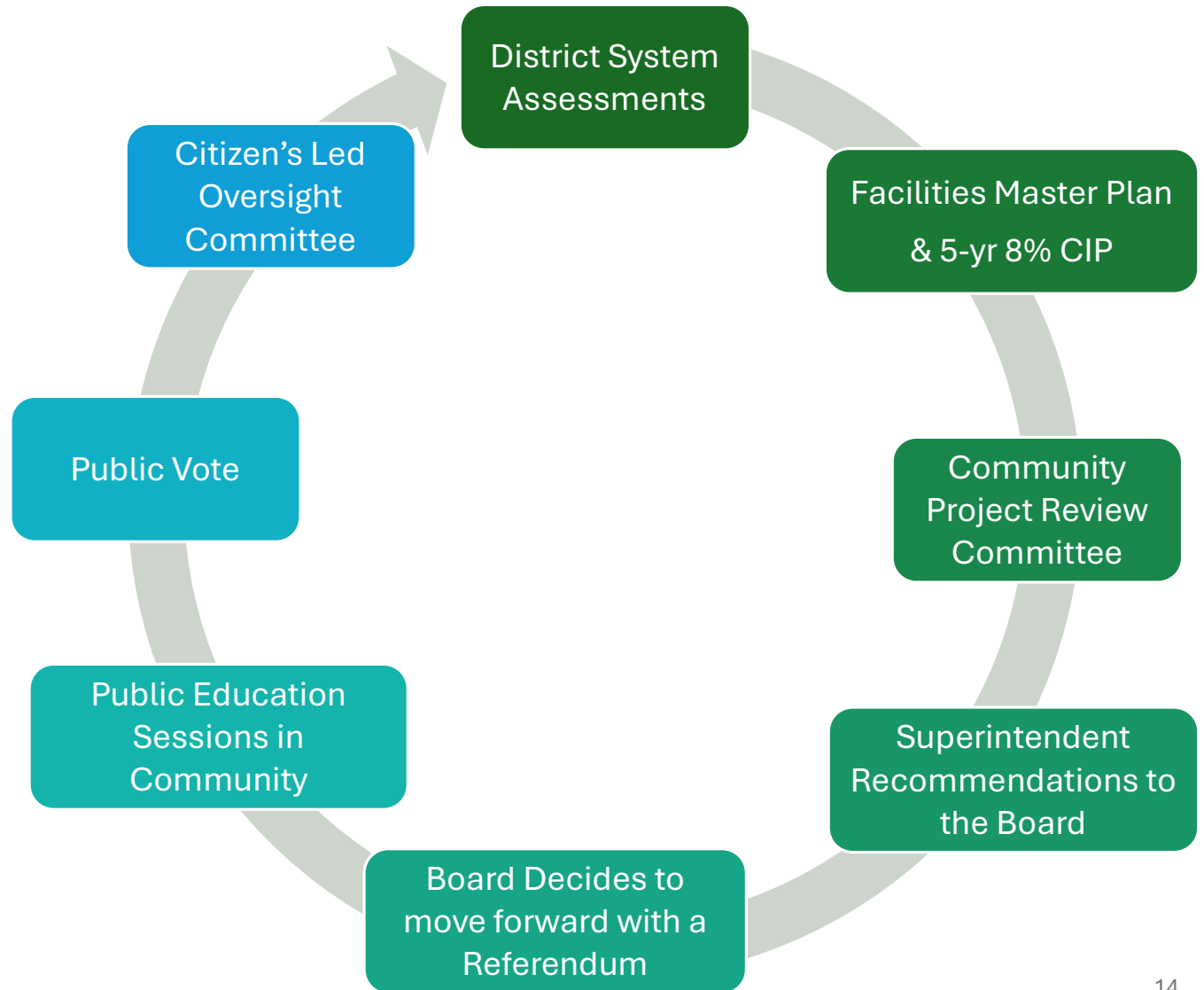
In 2019 Beaufort County voters approved the school district's \$344M bond referendum – the largest in the district's history and the first in over 11 years



In 2023 Beaufort County voters approved another school bond referendum for \$439M with 72% voter approval

Bond Referendum
A strategic investment in the future of education in Beaufort County by responding to the needs of the community and improving the academic experience for all students.

Referendum Process for Success



Building Trust and Accountability

Community Project Review Committees

CPRC 2019

In 2019, interim Superintendent Dr. Berg appointed a committee to make recommendations on facilities projects.

This committee reviewed facility condition assessments, heard from safety/security experts, talked with community planners, and visited schools in the district and other school districts.

Putting in over 1500 volunteer hours this CPRC prioritized a list of over \$629M of projects

Their recommendations resulted in the \$344M bond referendum in 2019 overwhelming approved by the public with >70% approval

CPRC 2023

In December 2022, Superintendent Dr. Rodriguez appointed a committee to again make recommendations on facilities projects. This committee reviewed all projects recommended by the previous committee that were not on the final referendum list.

They also reviewed the 2022 facility condition assessment results, heard from district staff, Town of Bluffton planning staff, other experts on the potential projects.

Putting in over 900 total volunteer hours, the CPRC 2.0 prioritized a list of over \$980M of projects.

Their list resulted in the Board moving forward in a \$439M bond referendum going to voters November 7, 2023.

Building Trust and Accountability Citizen Led Oversight Committee (CLOC)

The CLOC is an independent group of volunteers who monitor all referendum building projects, schedules, budgets and expenditures.

The committee serves as an independent watchdog by monitoring projects and spending and then reporting directly to the public and the Board of Education.

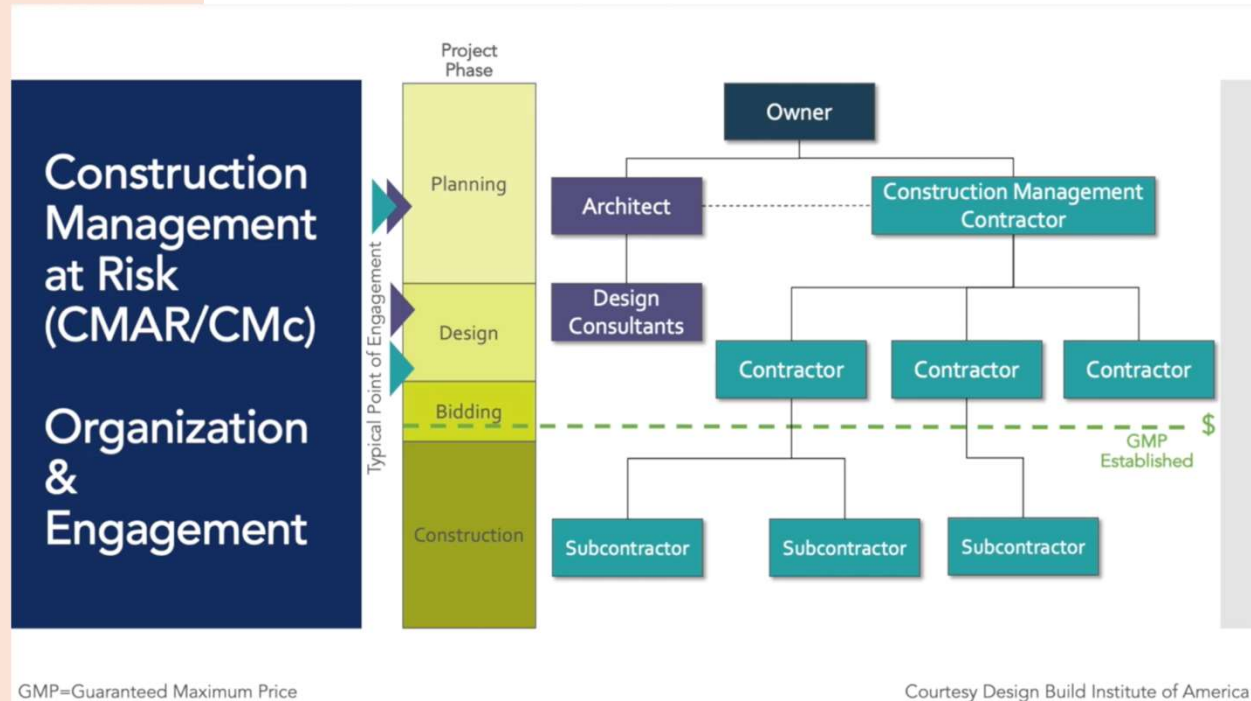


Permitting for projects

- New school construction and major renovation projects are approved through the SC Dept of Education – Office of School Facilities (OSF) who acts as our building permitting agency
- District must follow local permitting processes for storm water management, conservation, and other requirements.
- Beaufort County faces challenges to projects and permitting are due to coastal hurricane zones, and earthquake zone requirements that other districts more in-land districts in South Carolina do not face
- ***Permitting can cause schedules to slip.***

Construction Management @Risk (CMAR)

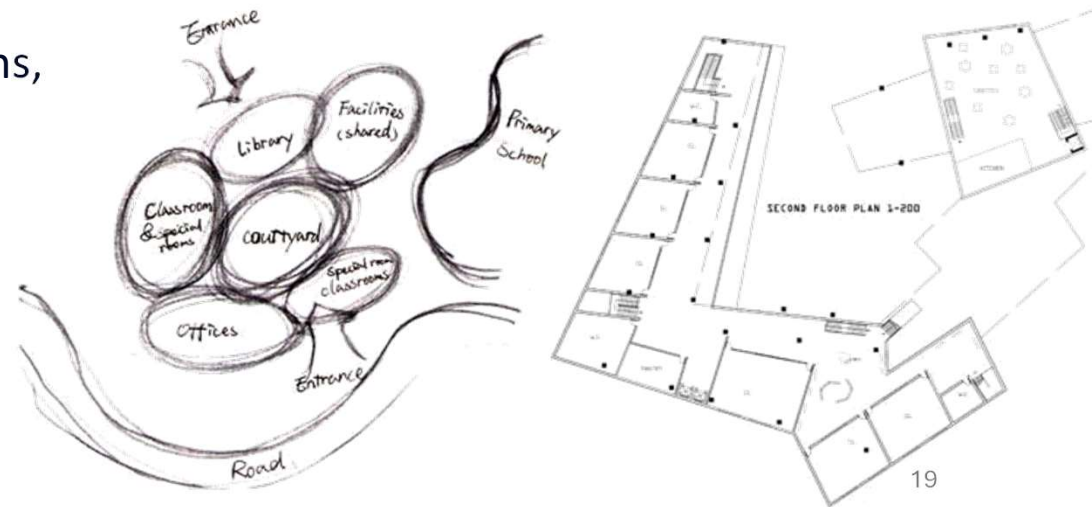
- The hiring of architects and contractors for small and large projects must adhere to all procurement rules of BCSD and South Carolina
- The District mainly uses the CMAR as a delivery method which entails a commitment by the Contractor (CM) to deliver the project within a Guaranteed Maximum Price (GMP) which is based on the architect's construction documents and specifications. This methodology requires the architect and contractor to work closely with the district to make the GMP



Design Process

- Procure architect/design services
- Pre-Design/ Programming
 - what's needed – what type of space and sizing
- Schematic Design (SD)
 - Addresses Adjacency and Scale
- Design Development (DD)
 - site plan, floor plans, sections, elevations, and details
- Construction Documents (CD)
 - written and graphic documentation for bidding and building the project
- Bidding and Construction Administration

SPACE DESCRIPTION		Middle School Program Area					
600	planned students, grades 6-7	SPACES		STUDENTS		NET SQUARE FEET	
800	core capacity	teaching	total	each	total	each	total
1 STUDENT LEARNING SPACES							
		Student capacity per typical CR =				Varies	
A. Academic Areas							
1.	6th grade general classroom	6	6	24	144	800	4,800
2.	6th grade flex classroom	-	-	-	-	800	-
3.	6th grade collaboration commons	-	1	-	-	800	800
4.	7th grade general classroom	6	6	24	144	800	4,800
5.	7th grade flex classroom	-	-	-	-	800	-
6.	7th grade collaboration commons	-	1	-	-	800	800
7.	8th grade general classroom	6	6	24	144	800	4,800
8.	8th grade flex classroom	-	1	-	-	800	800
9.	8th grade collaboration commons	-	1	-	-	800	800
10.	Resource Room	-	2	-	-	400	800
11.	ESOL	-	1	-	-	400	400
12.	In school suspension	-	1	-	-	400	400
13.	Small group rooms	-	6	-	-	100	600
13.	Student toilets	-	-	-	-	150	-
14.	Storage	-	3	-	-	100	300
Sub-Total:		18			432		20,100



Four Construction Project Managers

There could be multiple projects at each location – 8% (various years) as well as Referendum 2019 & 2023

Alexander Marshall

- May River Elementary
- New Early Childhood Center in Bluffton
- Battery Creek High
- Beaufort Elementary
- May River High
- Bluffton Elementary & ECC
- HE McCracken Middle
- Okatie Elementary
- Robert Smalls Leadership Academy
- Red Cedar Elementary
- MC Riley Elementary & ECC

Ben Froemming

- Bluffton Middle
- River Ridge Academy
- Broad River Elementary
- James J Davis ECC
- Lady's Island Elementary
- St Helena Elementary & ECC
- Shanklin Elementary
- Whale Branch Elementary
- Whale Branch Middle

Tim Summers

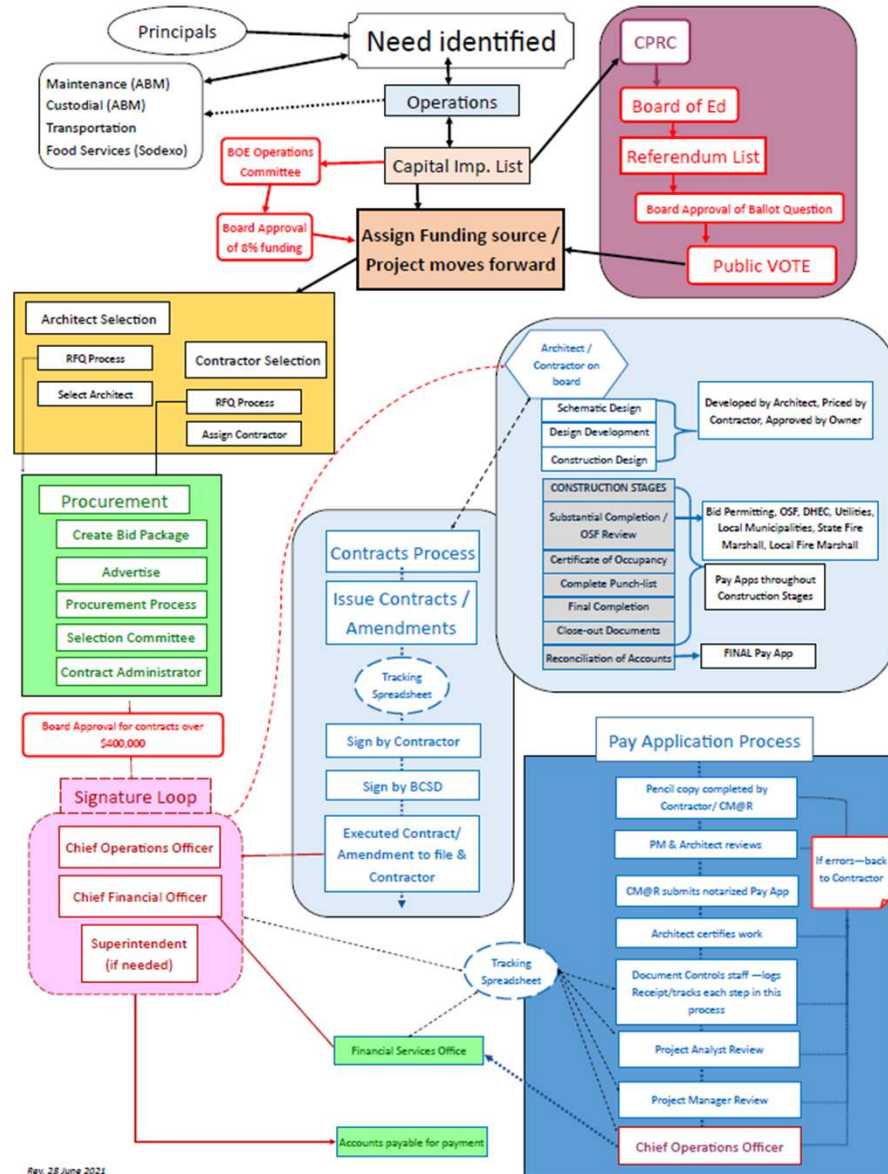
- Bluffton High
- Hilton Head Island High
- Hilton Head Island Middle
- Hilton Head Island ECC
- Hilton Head Island Elementary (IB)
- Hilton Head Island School for the Creative Arts
- Daufuskie Island School

Mark Koll

- Lady's Island Middle
- Whale Branch Early College High
- St Helena ECC
- Riverview Charter
- Right Choices
- Pritchardville Elementary
- Port Royal Elementary
- Mossy Oaks Elementary
- District Office (DESC)
- Coosa Elementary
- Beaufort Middle
- Beaufort High

Process Flow Chart

This was created for the Community Project Review Committee to discuss the processes in place and was updated annually as needed



Document Control – Better Workflows with ProjectMates

The screenshot displays the ProjectMates web application interface. At the top, the header shows the project name 'MRES - May River Elementary School, Bluffton SC' with ID '51325371-4'. The user is identified as 'Carol Crutchfield User'. The main content area is titled 'Construction Drawings' and includes a search bar and 'Upload' and 'PlanGrid' buttons. A breadcrumb trail shows 'Design > 100% CDs > Construction Drawings'. A table lists five PDF documents with their names, dates added, and sizes. A left-hand navigation menu is visible, with 'Design' selected under the 'Documents' section.

	Expand All		Name	Date Added	Size
		<input type="checkbox"/>			
Schematic Design	^	<input type="checkbox"/>	2024.07.29_BCS MRES_FINAL_CD_VOL 1 DWGS.pdf	Aug 02, 2024	350.61 MB
Design Development	^	<input type="checkbox"/>	2024.07.29_BCS MRES_FINAL_CD_VOL 2 DWGS.pdf	Aug 02, 2024	112.01 MB
25% CDs	^	<input type="checkbox"/>	23.317.00 MRES Addendum 1 with attachments.pdf	Aug 21, 2024	14.07 MB
25% CDs	^	<input type="checkbox"/>	23.317.00 MRES Addendum 2 with Attachments.pdf	Aug 21, 2024	20.71 MB
50% CDs	^	<input type="checkbox"/>	23.317.00 MRES Addendum 2 with Attachments_REV.pdf	Aug 21, 2024	22.04 MB
50% CDs	^				
75% CDs	^				
75% CDs	^				
100% CDs	^				
Construction Drawings	^				
Specifications	^				
Permit Set	^				
Construction Drawings	^				
Construction Drawings	^				

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CONVERSATIONS & QUESTIONS



BEAUFORT COUNTY
SCHOOL DISTRICT