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

(Okatie Elementary School Media Center and Via Zoom)
December 10, 2025

PRESENTATION
AGENDA

1. Hindsight (Lessons Learned) Reports
   A. Project Manager Overview
   B. Information Technology Overview
2. Executive Summary of Yearly Lessons Learned
   A. 2023
   B. 2024

Hindsight (Lessons Learned) Reports

Project Management – Most Important Lessons Learned

A. Start planning/design earlier to accommodate longer equipment lead times.

B. Daily site coordination among construction, custodial, and school staff is essential.

C. Avoid scope additions after April to prevent procurement delays.

D. Identify and replace failing contractors early to avoid project setbacks.

E. Projectmates implementation improved project record keeping.

F. Understand property covenants thoroughly before construction; anticipate legal challenges.

G. Consider phasing large scopes over multiple years to manage escalation.

Project Management – Key Action Items - STRATEGIC

1. Implement Early Contractor Evaluation Protocols
2. Standardize Project Documentation
3. Enhance Communication & Coordination
4. Improve Project Information Sharing

Project Management – Key Action Items – PLANNING/PRE-DESIGN

1. Utility Coordination Protocol
2. Covenant & Legal Review
3. Start entitlements, scope, and pricing exercises earlier, even pre-bond.
4. Utilize project charter and include custodial in the coordination.

Hindsight (Lessons Learned)Reports
Project Management

Project Management – Key Action Items - DESIGN

1. Design Standards Enforcement
2. Traffic & Land Planning Coordination

Project Management – Key Action Items – BIDDING/PROCUREMENT

1. Bidder Qualification Process
2. Extend Pricing Timeline

Project Management – Key Action Items - CONSTRUCTION

1. As-Built Documentation Tracking

2. Athletic Coordination

3. Scope Management

4. Use color-coded and dated phasing/logistics plans for highly visible coordination

5. Coordination for preventative maintenance work during renovations

Project Management – Key Action Items – MOVE-IN/CLOSEOUT/ WARRANTY

1. Warranty Tracking System

2. Move-In Planning

3. Utilize a "Handoff Walkthrough" prior to project completion

IT – Effectiveness of Implemented Lessons Learned

✅ Continue early site walks.

✅ Leverage 2019 program insights.

⚠️ Monitor contractor workload.

⚠️ Evaluate pilot project execution.

IT – Key Action Items – COMMUNICATION

- ✅ Maintain regular site walkthroughs.
- ✅ Improve PMIS training and support.
- ⚠️ Reinstate weekly PM meetings.
- ⚠️ Clarify roles and responsibilities.
- ⚠️ Ensure formal communication of design changes.

IT – Key Action Items – PLANNING

- ✅ Engage stakeholders early.
- ✅ Continue grouping projects for procurement.
- ⚠️ Plan for additional server capacity.

Hindsight (Lessons Learned) Reports
Information Technology

IT – Key Action Items – PILOT PROJECTS

✅ Use pilot projects to test system design and architecture.

✅ Separate complex scopes (e.g., system merging) to streamline closeout.

⚠️ Avoid using the same subcontractor across all pilots.

⚠️ Assess pilot project impact on broader project timelines and resource allocation.

IT – Key Action Items – CONSTRUCTION

✅ Continue using smaller scopes.

✅ Ensure thorough subcontractor scope reviews.

✅ Provide clean floorplans for camera and other technology equipment layouts.

⚠️ Improve vendor sequencing and coordination.

⚠️ Support struggling GCs with clearer expectations and oversight.

Hindsight (Lessons Learned) Reports Information Technology

IT – Key Action Items – START-UP/CLOSEOUT/WARRANTY

- ✅ Ensure handoff to IT only after full system completion.
- ✅ Require contractors to provide verified as-builts and device/IP/MAC spreadsheets.
- ✅ Implement pre-punch walkthroughs.
- ⚠️ Clarify maintenance responsibilities.
- ⚠️ Improve access to closeout documentation.

IT – Key Action Items – OTHER

- ✅ Define cross-departmental roles.
- ✅ Utilize responsibility matrix ("the matrix") in all planning and implementation
- ⚠️ Address lifecycle management budgeting.
- ⚠️ Evaluate contractor performance.
- ⚠️ Address blind spots in camera coverage identified from the 2019 referendum.

Executive Summary of Yearly Lessons Learned

Executive Summary of Yearly Lessons Learned

A. **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

B. September 2024 (Operations Dept. and Project Mgmt. Staff)

- 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

- Major Renovation 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

- Minor Renovation/Limited Scope Issues:
  - Communication
  - Clear scope
  - Field verifications
  - Subject matter expert involvement
  - Acceptance of end product
  - Equity
  - Document/closeout management
  - Limited subcontractors

14

Executive Summary of Yearly Lessons Learned

A. **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

Executive Summary of Yearly Lessons Learned

B. **September 2024 (IT Dept. Staff)**

- Establish clear, consistent communication
- Engage stakeholders and IT early
- Conduct thorough design verification including existing conditions site visits and drawing reviews
- Plan realistically for technology needs
- Avoid overloading teams (contractor and IT)
- Use pilot projects to confirm scope and execution
- Ensure scope and budget are complete and accurate

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

(Okatie Elementary School Media Center and Via Zoom)
December 10, 2025