



October 1, 2020

Joris Jabouin
Chief Auditor
The School Board of Broward County, Florida

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Re: RFP FY21-138 for Cost and Program Controls Manager Services

Dear Joris:

Pursuant to your request, and our Construction, Operational & IT Auditing Services Agreement dated September 4, 2019, RSM conducted a review of the District's RFP FY21-138 for Cost and Program Controls Manager (CPCM) Services. Pursuant to a request from the Office of Capital Programs and Procurement & Warehousing Services, RSM is presenting this letter as confirmation that our comments were taken into consideration within the CPCM RFP that will be presented to the Board for advertisement on October 6, 2020.

Procedures performed:

- On September 1, 2020, RSM obtained and reviewed the Scope of Work related to the RFP FY21-138 for CPCM Services.
- On September 10, 2020, we provided initial comments and recommendations to the District for consideration within the Scope of Services. (see Appendix A)
- On September 16, 2020, the District provided responses in the form of additions and updated language to the Scope of Work.
 - We reviewed the addition and updated language to confirm that all considerations were addressed.
- On September 21 2020, RSM obtained and reviewed the RFP and Agreement related to the RFP FY21-138 for CPCM Services.
- On September 25, 2020, we provided comments and recommendations to the District for consideration within the RFP and Agreement. (see Appendix B)
- On September 29, 2020, we obtained and reviewed the updated RFQ, Agreement and Scope of Services.
 - We reviewed the updated document and confirmed that all prior comments, recommendations, and considerations were addressed.

In summary, the CPCM Solicitation that will be presented to the Board on October 6, 2020 incorporated the considerations RSM posed to management. We believe this solicitation serve as a robust and explicit foundation for CPCM Services, to aid the District in completion of the SMART Bond Program.

Respectfully Submitted,

RSM US LLP

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Appendix A



September 10, 2020

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Pursuant to your request, and our Construction, Operational & IT Auditing Services Agreement dated September 4, 2019, RSM is pleased to present the results of our review of the Scope of Services related to the District's RFP FY21-138 for Cost and Program Controls Manager. The following pages detail our initial comments and recommendations related to our review of the Scope of Services.

In summary, the District should consider the following key recommendations as it embarks upon refinement of this solicitation:

- The District should consider modifying the Scope of Services to include more up-to-date information in the Objectives (6.1) and Relationships (6.2) sections regarding the District's use of e-Builder. These sections include references to the District's system, and use of e-Builder; however, considering the District's current level of implementation, and the need for the awarded CPCM to expeditiously mobilize its use of e-Builder, an earlier explanation of the District's current utilization (as noted in 6.4.6) should be considered.
- The District should consider providing a matrix / table that outlines the individual responsibilities of the CPCM and PMOR. Although these responsibilities are defined in narrative throughout the Scope of Services, a single point of information outlining responsibilities of each vendor may be considered.
- In the following page, additional items and recommended updates to specific sections / paragraphs within the Scope of Services are provided for the District's consideration.

We are happy to discuss any of the comments herein, and appreciate the opportunity to help the District as you move forward with this incredibly important initiative.

Respectfully Submitted,

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Appendix A

1	Scope of Services – Introduction, Section 6.0 We recommend additional language be included in the introduction regarding the CPCM's use of e-Builder. The current languages indicates the CPCM is expected to "utilize" e-Builder. The District should consider adding additional information regarding the expectation of the CPCM to support, administer, and provide training for e-Builder.
2	Scope of Services – Current Status of the BCPS Capital Improvement Program, Section 6.1.3 The District should consider providing additional context related to projects currently in the design phase. For example, "Year 4 and 5 projects" and "more complex projects from earlier program years" could be more clearly defined for respondents not currently familiar with the program. The District may consider correlating these phrases to the schedule shown in the Attachment I.
3	Scope of Services – BCPS's Objectives in Retaining a CPCM, Section 6.1.4 Understanding the District has implemented e-Builder, we recommend removing "implementing e-Builder" from the CPCM's objectives.
4	Scope of Services – BCPS's Objectives in Retaining a CPCM, Section 6.1.4 This section mentions the CPCM will assist with establishing metrics. The District may consider updating language to include review of current metrics and evaluation to identify opportunities for modification to existing metrics or establishment new metrics.
5	Scope of Services, Relationships with Project Design Professionals and Contractors, Section 6.2.4 Although the CPCM's role (in conjunction with the PMOR) is defined throughout the RFP, the District may consider including a matrix that defines the responsibilities of both the CPCM and PMOR.
6	Scope of Services, Relationships with Planning and Design, Section 6.2.6.1 We recommend adding additional language detailing the current volume of e-Builder licenses / users managed by the CPCM.
7	Scope of Services, Relationships with Physical Plant Operations (PPO), Section 6.2.9 We recommend providing additional context related to PPO's role and the CPCM's relationship with the Department, including the expected volume of work orders related to capital projects.
8	Scope of Services, Leadership, Section 6.3.3 We noted that Section 6.2.1 requires Superintendent and School Board approval for proposed changes to the CPCM Lead and/or Principal-in-Charge, but Section 6.3.3 does not include the Superintendent as a required approver for proposed changes to the CPCM Lead and/or Principal-in-Charge.
9	Scope of Services, Knowledge Management, Section 6.3.5 We recommend adding language to clarify that e-Builder will be the one centralized source of information.
10	Scope of Services, Reporting, Section 6.3.6 We recommend that e-Builder be explicitly named when referring to the centralized knowledge management and reporting system.
11	Scope of Services, Schedule Controls, Section 6.4.1 This section notes the CPCM is responsible for developing the baseline Master Program Schedule. The District may consider updating language to include review of the current schedule and evaluation for opportunities to improve and/or modify the current schedule.
12	Scope of Services, Change Management, Section 6.4.4 This section notes the CPCM is expected to create appropriate construction contingencies in order to proactively mitigate changes. The District may consider updating language to include review of the existing budgets and contingencies and evaluation for opportunities to improve and/or modify the current budgets.
13	Scope of Services, Cost Proposal, Section 7 This sections requests respondents to provide a not to exceed cost for the base contract term of three years and for each of the two, one year extension periods. Considering the flexible staffing structure, has the District considered how proposers should align proposed NTE costs with the current program schedule?

Appendix B



September 25, 2020

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Pursuant to your request, and our Construction, Operational & IT Auditing Services Agreement dated September 4, 2019, RSM is pleased to present the results of our review of the District's RFP FY21-138 for Cost and Program Controls Manager and the sample Agreement therein. The following table details our initial comments and recommendations related to our review:


1	CPCM RFP – Evaluation of Firms, Section 5.1
	During our review of Section 5.1 we noted that the sum of the “possible points” for the evaluation criteria equals 95 points, rather than the stated 100 total points. This variance may be attributed to Section C2 (Proposer Experience), where the total possible points equal thirteen (13) in Section 5.1, and eighteen (18) maximum points in Section 4.2.4 (Section C2). The scoring criteria breakdown in Section 5.5.1 also shows thirteen (13) possible points for Section C2.
2	CPCM RFP – Initial Scoring, Section 5.4.2
	The District should consider removing the term “bonus points” from Section C2 (Firm Experience) and Section D1 (Team Structure), given that these points are included in the 100 possible point total in Section 5.1.
3	CPCM Agreement – Quarterly Evaluation, Section 2.07.01
	To provide flexibility, and due to the variability in frequency and evaluator, the District may consider the following language: <u>Regular Evaluation.</u> <i>Evaluations shall be conducted by District Staff on a quarterly basis, in conjunction with evaluations conducted by the Chief Auditor and/or third-party representatives on a regular basis, to measure performance. Such evaluations shall be communicated to VENDOR to identify areas for betterment and shall be used as basis for continuous improvement.</i>
4	CPCM Agreement – e-Builder, Section 3.28C
	During our review of the RFP document, we were unable to locate the referenced “Article 3.1” related to e-Builder workflows. The District may consider updating this reference.

We are happy to discuss any of the comments herein, and appreciate the opportunity to help the District as you move forward with this incredibly important initiative.

Respectfully Submitted,

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