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# Broward County Public Schools

## “Big 3” Project Analysis

May 2024



TABLE OF CONTENTS

Transmittal Letter ..... 1

Executive Summary ..... 2

Background ..... 5

“Big 3” Overview..... 8

RSM Comparative Scope Analysis ..... 18

Objectives and Approach ..... 26

Observations ..... 27

Appendix A – Stranahan High School..... 40

Appendix B – Blanche Ely High School ..... 54

Appendix C – Northeast High School ..... 68

Appendix D – SMART Program Schedule Comparison & Program Year Analysis ..... 86

Appendix E – PM/OR Response to Observation #3 and RSM Comparative Scope Analysis ..... 94



## TRANSMITTAL LETTER

May 9, 2024

Dave Rhodes, Task Assigned Chief Auditor  
Broward County Public Schools  
600 SE 3rd Avenue, 8th Floor  
Fort Lauderdale, Florida 33301

Pursuant to the approved internal audit scope of work, dated March 20, 2023, we hereby submit our “Big 3” Project Analysis. We will present this report to the Audit Committee on May 16, 2024. Our report is organized in the following sections:

<b>Executive Summary</b>	This section includes a brief background and summary of the observations noted during our analysis.
<b>Background</b>	This section includes a brief background on the 2014 Facility Needs Assessment and SMART Program.
<b>“Big 3” Overview</b>	This section provides an overview of the “Big 3” schools, including the results from the 2014 Facility Needs Assessment, initial project funding, and a summary of projects for each school.
<b>RSM Comparative Scope Analysis</b>	This section provides the results of our comparative scope analysis of the “School Deficiency Listings” developed as part of the 2014 Facility Needs Assessment and the scopes of work for the “Big 3”.
<b>Objectives and Approach</b>	The objectives and approach of our analysis are explained in this section.
<b>Observations</b>	This section presents the observations noted during our analysis, recommended actions, as well as management responses.
<b>Appendix</b>	This section includes supplemental appendices, including Project Performance Reports, Board Action Timelines, SMART Program Schedule Comparison and Program Year Analysis, and the PM/OR’s response to Observation #3 and RSM’s Comparative Scope Analysis.

We would like to thank all those involved for their assistance in connection with the “Big 3” Project Analysis at Broward County Public Schools.

Respectfully Submitted,

*RSM US LLP*

**RSM US LLP**



## EXECUTIVE SUMMARY

### Background

The 2014 Facility Needs Assessment identified approximately \$3 billion in needs for BCPS facilities. The results of the Needs Assessment were used to inform capital planning for the District’s Safety, Music & Art, Athletics, Renovations, and Technology (“SMART”) Program and District Educational Facilities Plan. On November 4, 2014, voters approved the District’s initiative to issue \$800 million in general obligation bonds to modernize its educational facilities and upgrade instructional technology.

On May 15, 2015, the School Board of Broward County (“SBBC”) approved the amendment of the Adopted District Educational Facilities Plan (“ADEFP”), which modified the District’s capital program to include the anticipated funds from the Bond, and incorporate new projects based on the results of the 2014 Facility Needs Assessment. These projects, along with previously approved projects funded with existing millage formed the \$984 million SMART Program. The \$984 million program represented a third of the \$3 billion in total needs identified through the 2014 Facility Needs Assessment.

Stranahan, Blanche Ely, and Northeast High School were the first SMART projects presented to the Board for advertisement, and are commonly referred to as the “Big 3”, as they were used to demonstrate to the public the need for critical capital improvements. Each school has experienced unique challenges throughout the duration of the SMART Program, including, but not limited to, delays in the initial procurement of architects and construction managers, turnover of BCPS and program manager/owner’s representative personnel, and delays in the design and construction phases. While most of the renovations have been completed for the original SMART Program Renovations projects for the “Big 3”, all three projects are pending project-wide substantial completion and final closure, as of the date of this report.

### Conclusions

Through our comparative analysis of the 2014 Facility Needs Assessment and scopes of work for the “Big 3” projects, we noted that the majority of GOB-related deficiency items identified in the Needs Assessment appeared to be addressed through various projects. However, certain items included in the initial scope of the GOB or SMART Program did not appear to be included in the final scope for construction. Our analysis also revealed several deficiencies related to the execution, accuracy, and documentation of the 2014 Facility Needs Assessment, which served as the basis for scope development for the SMART Program. As such, the information utilized by the District and third-party construction professionals to execute the SMART Program may not have aligned with the actual conditions or requirements of the schools. In addition, we noted observations related to Castaldi Analysis, contractor compliance with S/M/WBE participation commitments, contractor compliance with contractual construction schedules, and the retention and/or availability of third-party non-destructive/destructive testing reports.

### Approach

Our audit approach consisted, but was not limited to the following:

- Conducted a comparative analysis of the 2014 Facility Needs Assessment and the scopes of work for Stranahan, Northeast, and Blanche Ely High School.
- Conducted interviews with key stakeholders to obtain an understanding of each project’s history
- Reviewed the School Deficiency Listings to obtain an understanding of needs identified prior to scope creation
- Determined what analysis (i.e., Castaldi Analysis / destructive testing) were performed or considered during scope creation for each project
- Obtained and reviewed the District’s 5-year capital plan to gain an understanding of what projects and/or scope items were funded at program inception
- Reviewed School Board meeting minutes and agendas and documented Board approval of changes to the scope of work and budget
- For each project, we performed testing to validate that S/M/WBE goals are consistent with other SMART projects and performed testing to validate monitoring of contractor performance relative to goals

### Reporting

Fieldwork was conducted between April 2023 and March 2024. At the conclusion of our procedures, we summarized our findings into this report. We have reviewed the results of our testing with OCA, the CPCM and PM/OR teams, and incorporated management’s response herein.



## EXECUTIVE SUMMARY (CONTINUED)

### Observations Summary

Below is a summary listing of the observations that were identified during our analysis. Detailed observations are included in the “Observations” section of the report on page 27.

Observations Summary
Observations
<p><b>1. 2014 Facility Needs Assessment</b></p> <p>Through our comparative scope analysis and inquiry with stakeholders, we noted deficiencies related to the execution and documentation of the 2014 Facility Needs Assessment, and the prioritization of project scopes. Further, while assessment data was provided for individual schools, stakeholders noted that a comprehensive final report was not provided at the conclusion of the 2014 Facility Needs Assessment.</p>
<p><b>2. Castaldi Analysis</b></p> <p>Between 2005 and 2009, Castaldi analyses were performed by third-party consultants for each of the “Big 3” schools to compare the costs of renovation versus new construction for individual buildings. Through our analysis, we noted that for 27 buildings, renovations were performed as part of the SMART Program, despite previous conclusions from third-party consultants and the Florida Department of Education that new construction would be more economical than renovation of these buildings.</p>
<p><b>3. Unaddressed Deficiencies from the 2014 Facility Needs Assessment</b></p> <p>Through our comparative analysis of the 2014 Facility Needs Assessment and the executed scopes of work for the “Big 3” schools, we noted that deficiency items included in the initial scope of the GOB Program did not appear to be included in the final scope for construction.</p>
<p><b>4. S/M/WBE Compliance and Monitoring</b></p> <p>Through our review of Small/Minority/Women Business Enterprises (“S/M/WBE”) compliance data from the District’s supplier diversity management software, B2GNow, we noted that ten (10) of eleven (11) projects reviewed did not meet their contractual S/M/WBE participation commitment. Further, through discussions with the Economic Development &amp; Diversity Compliance (“EDDC”) Department, we noted that S/M/WBE compliance data is not available in B2GNow for Stranahan (P.001683) or Blanche Ely High School (P.001646). Additionally, we noted discrepancies between the data captured in B2GNow and source documentation, such as contract documents and contractor payment applications.</p>
<p><b>5. Contractual Construction Schedules</b></p> <p>RSM previously reported a finding related to construction manager compliance with contractual construction schedules in the September 2022 <i>Program Management Internal Audit Report</i> (Observation #4), which remains open as of the date of this report. Through our review of the contract documents for the SMART Program Renovations projects for the “Big 3” schools, we noted that all three (3) projects have surpassed their contractual substantial completion date. While change orders to extend the construction duration were issued for Northeast High School (P.001684) and Blanche Ely High School (P.001646), each project has surpassed the modified substantial completion date.</p>



## EXECUTIVE SUMMARY (CONTINUED)

### Observations Summary (Continued)

Observations Summary	
Observations	
<b>6. Non-Destructive/Destructive Testing Reports</b>	
For each of the “Big 3” projects, we noted that third-party non-destructive/destructive testing reports were not readily available or retained in the District’s construction management software and system of record, e-Builder. Further, while testing reports were provided upon further request by the PM/OR for Stranahan High School (P.001683) and Blanche Ely High School (P.001646), reports were not provided for Northeast High School (P.001684), as of the date of this report.	



## BACKGROUND

### 2014 Facility Needs Assessment

On February 11, 2014, the School Board of Broward County (“SBBC”) approved an Agreement for Professional Services with Jacobs Project Management Co. (“Jacobs”) to conduct a comprehensive facilities condition and educational adequacy assessment of the District’s facilities. According to the Executive Summary provided as an exhibit to the February 11<sup>th</sup> Board item, the scope of the assessment included 36,000,000 square feet of facilities, 1,700,000 square feet of portable buildings, and 262 Broward County Public Schools (“BCPS”) and support facilities. The District utilized a “piggyback” procurement method and leveraged an existing contract between Jacobs and Fort Bend Independent School District (“FBISD”). Prior to contract approval, Jacobs presented the District with three (3) options or leverage models for the approach of the Needs assessment, each with varying levels of District-involvement. According to meeting minutes from the Special School Board Meeting on January 14, 2014, the following options were presented to the District:

- **Option #1 (\$1,269,783):** In-house personnel would perform the assessments, with the intent of leveraging internal expertise, and Jacobs would author the Needs Assessment.
- **Option #2 (\$1,969,783):** An expert from Jacobs would serve as a team leader for each assessment team, and Jacobs would author the Needs Assessment
- **Option #3 (\$3,269,783):** Jacobs would perform the full scope of the Needs Assessment.

The District ultimately selected Option #1, and accepted Jacobs’ proposal for a fixed fee of \$1,269,783. To execute the Needs Assessment, site inspections were performed primarily by District personnel from Physical Plant Operations (“PPO”) and the Building Department. The inspections were facilitated and documented using standardized forms provided by Jacobs. The data gathered from the Assessment was input into M.A.P.P.S.™, Jacobs’ assessment and capital planning database. This data was used as the basis for initial planning and scope development for the SMART Program (refer to “SMART Program” section on page 6 for additional information). Key data and/or reports generated from M.A.P.P.S.™ that were utilized to develop the scope of the SMART Program included, but were not limited to:

- **M.A.P.P.S.™ Deficiency Listing (“School Deficiency Listing”):** An itemized list of deficiencies for each school/facility, organized by building and discipline. The listing includes the following information:
  - Building number (or site level deficiency)
  - Description of the deficiency (e.g., “the window AC unit component requires replacement”)
  - Deficiency “system” or discipline (e.g., mechanical, roofing, electrical, fire and security, specialties, technology, etc.)
  - Deficiency category (e.g., capital renewal, deferred maintenance, educational adequacy, functional deficiency, code compliance, etc.)
  - Priority (deficiencies were rated on a scale of 1-5, with Priority 1 indicating a “Mission Critical” status and requiring immediate attention within one (1) year.
  - Repair cost (i.e., raw estimated cost of repair/replacement based on RSMeans data, an industry standard construction cost estimating software, and in some instances, input from the District)
- **M.A.P.P.S.™ Deficiency Detail:** A raw database of deficiencies with a breakdown of cost estimates, including construction adjustments and soft cost adjustments.
- **M.A.P.P.S.™ Detailed List:** A tabular raw database of deficiencies providing additional notes and quantities for cost estimation.

The building condition and educational assessments were completed during the summer of 2014. In total, the 2014 Needs Assessment identified approximately \$3 billion in capital needs.



## BACKGROUND (CONTINUED)

### SMART Program

On June 9, 2014, the School Board of Broward County (“SBBC”) approved Resolution No. 14-88, which requested that the Broward County Supervisor of Elections include a referendum on the November 4, 2014 ballot, and approve the ballot language regarding the issuance of \$800 million in general obligation bonds to modernize and improve the safety of outdated educational facilities and upgrade instructional technology. The Bond referendum was passed on November 4, 2014, with 73.66% voting in favor, per the Supervisor of Election’s records.

The General Obligation Bond (“GOB” or “Bond”) played a foundational role in the funding and execution of the District’s Safety, Music & Art, Athletics, Renovations, and Technology (“SMART”) Program. On May 15, 2015, the School Board of Broward County (“SBBC”) approved the Amended Adopted District Educational Facilities Plan (“ADEFP”), which modified the District’s capital program to include the anticipated funds from the Bond and incorporate new projects based on the results of the 2014 Facility Needs Assessment.

These projects, along with previously approved projects funded with existing millage formed the \$984 million SMART Program. The \$984 million program represented a third of the \$3 billion in total needs identified through the 2014 Facility Needs Assessment. The scope of the SMART Program focused on capital improvements to school facilities such as roofing, HVAC improvements, fire alarm and fire sprinkler upgrades, electrical, Americans with Disabilities Act (“ADA”) renovations, STEM lab improvements, media center enhancements, single point of entry, and classroom additions. In addition, each District school received \$100,000 of “School Choice Enhancement” funding to improve the condition of an instructional or educational space.

SMART Program funds were initially allocated based on a phased approach to renovations. The term “Program Year” was used to denote the years in which funding was allocated for projects under the SMART Program. For example, “Program Year 1” projects were the highest priority, and were funded in fiscal year 2015 following the approval of the Bond.

### Program Manager/Owner’s Representatives

#### Heery International, Inc.

On August 18, 2015, the School Board of Broward County approved the award of RFQ No. 15-115C for Program Manager/Owner’s Representative Services to Heery International, Inc. (“Heery”) for an initial award amount of \$16,200,000. The contract term was effective August 19, 2015, through August 18, 2018, with an option to extend for two (2) additional one (1) year periods, and if needed, 180 days beyond the expiration date of the renewal period. As the Program Manager/Owner’s Representative (“PM/OR”), Heery was tasked with managing the District’s Capital Improvement Program, overseeing all phases of capital projects, and implementing the District’s construction management software, e-Builder.

A seventh and final amendment was approved by the Board on July 21, 2020, which extended the agreement for a final six (6) month term from August 21, 2020 through February 20, 2021, to facilitate the transition to a new Owners Representative (see “AECOM Technical Services, Inc.” section below). Heery’s total contract fee for Years 1-5 ½ amounted to \$65,758,000.

#### AECOM Technical Services, Inc.

On April 14, 2020, the Board approved the advertisement of RFQ FY20-192 for Program Manager/Owner’s Representative Services. On July 21, 2020, the Board approved the award of RFQ FY20-192 to AECOM Technical Services, Inc. for an initial award amount of \$64,946,830. The initial contract term was effective beginning July 22, 2020, through July 21, 2023, with the option to extend for two (2) additional (1) one-year periods, and one (1) additional six-month period beyond the expiration date of the renewal period. On July 18, 2023, the Board approved the first amendment and contract extension through July 21, 2024. The amendment increased the total award amount by \$25,730,771, to \$90,677,601.





## BACKGROUND (CONTINUED)

### Cost and Program Controls Manager

On September 16, 2015, the Board approved the award of RFP No. 15-114C for Program Manager/Cost and Program Controls Services to Atkins North America, Inc. The initial contract term was effective September 17, 2015, through September 16, 2018, for a total award amount of \$6,456,073. According to the Executive Summary provided with the Board item, the scope was to manage all control systems for all capital projects as proposed at part of the 2014 General Obligation Bond (“GOB”) referendum. RFP No. 15-114C was renewed for the fourth time on July 21, 2020, through March 17, 2021, for an additional \$1,433,753, bringing the total amount awarded to \$13,794,500.

On January 20, 2021, Atkins was awarded RFP FY21-138 Program Manager – Cost and Program Control Services in the amount of \$8,527,430. The initial contract term was March 17, 2021 through March 16, 2024, with the option to be extended for two (2) additional one (1) year renewal periods and one (1) additional six (6) month period beyond the expiration date of the renewal period. On February 21, 2024, the Board approved the first contract extension for an additional one (1) year period, effective March 16, 2024 to March 15, 2025, in the amount of \$872,322, bringing the total award amount to \$9,399,751.



## “BIG 3” OVERVIEW

### Summary

Stranahan, Blanche Ely, and Northeast High School were the first SMART projects presented to the Board for advertisement, and are commonly referred to as the “Big 3”, as they were used to demonstrate to the public the need for critical capital improvements. Each school has experienced unique challenges throughout the duration of the SMART Program, including, but not limited to, delays in the initial procurement of architects and construction managers, BCPS and program manager/owner’s representative personnel turnover, and delays in the design and construction phases. While most of the renovations have been completed for the original SMART Program Renovations projects for the “Big 3”, all three (3) projects are pending project-wide substantial completion and final closure, as of March 2024. Detailed information on each of the “Big 3” SMART Program Renovations projects is provided in the pages that follow.

### 2014 Facility Needs Assessment Results

As shown in the table below, the 2014 Facility Needs Assessment identified over \$79.6 million in deficiencies for the “Big 3” schools, not including adjustments for soft costs. Following the completion of the Needs Assessment, and initiation of the General Obligation Bond, the District categorized specific deficiencies as “GOB”, which were to be included in the scope of the SMART Program. The table below summarizes the data captured in the “School Deficiency Listings” for the “Big 3”.

2014 Facility Needs Assessment: M.A.P.S Repair Costs <sup>1</sup>									
Discipline	Stranahan HS			Blanche Ely HS			Northeast HS		
	GOB	Non-GOB	Total	GOB	Non-GOB	Total	GOB	Non-GOB	Total
Mechanical	5,821,535	131,643	5,953,178	6,094,153	236,748	6,330,901	4,182,360	194,150	4,376,510
Roofing	3,235,886	130,786	3,366,672	2,887,507	-	2,887,507	3,123,767	6,143	3,129,910
Other	1,990,417	937,825	2,928,242	1,907,955	2,271,979	4,179,934	3,110,672	940,442	4,051,114
Fire & Security	1,835,523	-	1,835,523	152,234	8,050	160,284	2,428,161	69,122	2,497,283
Exterior	1,055,111	-	1,055,111	343,291	217,951	561,242	207,525	4,476	212,001
Site	905,545	6,887,489	7,793,034	-	547,866	547,866	63,412	1,634,101	1,697,513
Technology	542,346	721,823	1,264,169	586,527	1,079,455	1,665,982	863,555	2,257,987	3,121,542
Electrical	536,677	673,617	1,210,294	-	3,158,525	3,158,525	369,090	1,002,127	1,371,217
Interior	480,522	3,163,537	3,644,059	-	1,296,899	1,296,899	43,435	895,651	939,086
Specialties	121,323	2,159,206	2,280,529	127,495	868,222	995,717	534,371	1,691,007	2,225,378
Plumbing	-	292,542	292,542	-	1,674,654	1,674,654	-	702,082	702,082
Miscellaneous	-	-	-	78,512	-	78,512	2,269	7,992	10,261
Structural	-	-	-	13,540	-	13,540	-	-	-
Conveyances	-	-	-	-	163,879	163,879	-	-	-
<b>Total</b>	<b>16,524,885</b>	<b>15,098,468</b>	<b>31,623,353</b>	<b>12,191,214</b>	<b>11,524,228</b>	<b>23,715,442</b>	<b>14,928,617</b>	<b>9,405,280</b>	<b>24,333,897</b>

Note <sup>1</sup> Estimated repair cost, as shown in the M.A.P.S.™ “School Deficiency Listings”, which does not include construction and soft cost adjustments.



## “BIG 3” OVERVIEW (CONTINUED)

### FY 2014-15 District Educational Facilities Plan

The following table summarizes the SMART Program allocations approved as part of the Amended Adopted District Educational Facilities Plan by the School Board of Broward County on May 15, 2015 for Stranahan, Blanche Ely, and Northeast High School.

Adopted District Educational Facilities Plan for FY 2014-15					
SMART Program					
SMART Category	Stranahan HS	Blanche Ely HS	Northeast HS	Total	Scope
Athletics	300,000	-	-	300,000	Track Resurfacing
Athletics	121,000	121,000	121,000	363,000	Weight Room Renovation
Renovation	46,000	53,000	45,000	144,000	CAT 6 Data port Upgrade
Renovation	4,346,000	-	-	4,346,000	Roof and loggias replacement
Renovation	184,000	88,000	74,000	346,000	Wireless Network Upgrade
Renovation	1,238,000	1,140,000	2,727,000	5,105,000	STEM Lab improvements
Renovation	100,000	100,000	100,000	300,000	School Choice Enhancement
Renovation	653,000	668,000	-	1,321,000	Media Center improvements
Renovation	6,251,000	6,202,000	4,588,000	17,041,000	HVAC Improvements
Renovation	1,512,000	-	368,000	1,880,000	Electrical Improvements
Renovation	-	1,089,000	-	1,089,000	Building Envelope Improvements (i.e., Roof, Window, Ext Wall, etc.)
Renovation	-	2,791,886	-	2,791,886	IAQ & Fascia Replacement
Renovation	-	-	3,769,000	3,769,000	Re-Roofing
Renovation	-	-	284,000	284,000	ADA Renovations related to educational adequacy
Safety & Security	540,000	540,000	540,000	1,620,000	Single Point of Entry
Safety & Security	662,000	152,000	1,421,000	2,235,000	Fire Sprinklers
Safety & Security	1,174,000	-	1,007,000	2,181,000	Fire Alarm
Safety & Security	-	-	83,000	83,000	Safety & Security Upgrade
Technology	305,000	435,000	419,000	1,159,000	Additional computers to close computer gap
Technology	8,000	11,000	326,000	345,000	Technology Infrastructure (Servers, Racks, etc.)
<b>Subtotal</b>	<b>17,440,000</b>	<b>13,390,886</b>	<b>15,872,000</b>	<b>46,702,886</b>	



## “BIG 3” OVERVIEW (CONTINUED)

### Initial Procurement

On November 3, 2015, the School Board of Broward County (“SBBC” or “Board”) approved agenda items J-1, J-4, and J-5 for the Authorization to Advertise the Request for Proposals (“RFP”) for Design/Build Services for SMART Program Renovations at Stranahan, Blanche Ely, and Northeast High Schools. Six (6) months later, on May 3, 2016, the Board approved the District’s Qualification Selection Evaluation Committee (“QSEC”) recommendation to reject all proposals received for design/build services, and the termination of each of the three (3) RFPs.

Following the initial RFP advertisement, potential proposers expressed concerns that the evaluation criteria would result in the lowest cost proposal becoming the highest ranked, potentially minimizing the qualifications and experience of other proposers. On December 8, 2015, the Board approved staff’s recommendation to modify the evaluation criteria to prevent cost from being weighted too heavily in the evaluation of proposals and extend the deadline to submit proposals. QSEC meetings were conducted for each of the “Big 3” schools between February 4<sup>th</sup> and 5<sup>th</sup>, resulting in the recommendation to award all three (3) RFPs to The Morganti Group (“Morganti”) as the highest ranked firm.

Upon final review and preparation of the Board item to award the RFPs to Morganti, contract language was found in Morganti’s “Assumptions and Clarifications” document which qualified Morganti’s proposals to limit the project scope following design to align to their “Costs of Service”. After further review by the District’s Office of the General Counsel, it was recommended that the Program Manager/Owner’s Representative, Heery International, seek clarification from Morganti to determine their responsiveness to the RFP. This effort resulted in the rejection of The Morganti Group’s proposals as non-responsive.

Subsequently, Heery was advised by the District to engage the second highest ranked proposer for each RFP to clarify their proposals and assess their suitability as alternatives. It was confirmed that for at least one project, the scope outlined by the second-ranked firm was constrained to their Costs of Service proposal. Moreover, the cost proposal for Stranahan High from the second-ranked firm exceeded both the advertised project budget and the revised cost projections provided by the Cost and Program Controls Manager, Atkins.

Following discussions with the Office of the General Counsel and considering an existing bid protest for Blanche Ely, as well as the potential for a protest by Morganti if the District altered its award decision, it was determined that such actions could lead to additional delays. To address these concerns, QSEC meetings were conducted for each project on March 31, 2016, to re-evaluate prior recommendations, propose the rejection of all bids to facilitate the issuance of a revised solicitation with an updated scope and a different delivery method, and to deem Morganti’s proposals as non-responsive based on the conditional nature of their “Assumptions and Clarifications.”

On May 3, 2016, the Board approved the rejection of all proposals, and subsequently approved the Authorization to Advertise the Request for Qualifications (“RFQ”) for Professional Design Services for each of the “Big 3” schools, and instead utilize a Construction Manager at Risk (“CMAR”) delivery method. In a design-build delivery method, a single entity is responsible for both the design and construction of a project, whereas a CMAR delivery involves the separate procurement of both a designer and construction manager. Under this method, a designer or architect is hired to develop the project’s design, and a construction manager serves as a consultant to the owner during the design phase, but as a general contractor during the construction phase.

Additional information regarding the procurement of professional design services and construction manager at risk services can be found on the following pages for each of the three (3) schools.



## “BIG 3” OVERVIEW (CONTINUED)

### Stranahan High School: SMART GOB Renovations (P.001683)

Following the District’s decision to execute the “Big 3” SMART GOB Renovations projects utilizing a construction manager at risk delivery method (see “Initial Procurement” Section on page 10), the Board approved the advertisement of RFQ No. 16-167C for professional design services. On June 28, 2016 during a Special Board Meeting, the Board approved the issuance of RFQ 16-206C for Construction Manager at Risk Services for Stranahan High School, SMART GOB Renovations, Project No. P.001683.

On August 16, 2016, the Board awarded and approved the Professional Services Agreement (“PSA”) with Wolfberg Alvarez & Partners in the amount of \$997,050. At the same meeting, District staff provided an update on the progress of RFQ 16-206C. A total of eleven (11) proposals were received for Stranahan High School on August 11, 2016 in response to the solicitation. QSEC held a meeting on August 29, 2016 to discuss their recommendation for award. Of the eleven (11) proposals received on August 11, 2016, two (2) were withdrawn after submittal and were not evaluated or scored.

On November 1, 2016, the Board approved the recommendation for award of the Construction Services Agreement (“CSA”) to the highest ranked firm, Gilbane Building Company for a lump sum pre-construction fee of \$138,750. The scope of work was to include, but not be limited to, replace non-ADA compliant concrete ramps, install aluminum canopies, single point of entry, fire sprinklers, fire alarm, weight room renovation, roof and loggias replacement, STEM lab improvements, media center improvements, HVAC improvements, electrical improvements. At the time of award, the total funds allocated for project scope included \$16,847,000, including soft costs.

On July 25, 2017, Guaranteed Maximum Price (“GMP”) Amendment #1 to the Construction Services Agreement was approved by the Board for single point of entry improvements in the amount of \$420,143. According to e-Builder schedule data, the project was certified for occupancy on January 8, 2018, and reached final completion on July 11, 2018. A second and final GMP amendment was approved by the Board on April 24, 2018 in the amount of \$24,280,108 for the remaining SMART Program improvements.

According to the Executive Summary provided as part of the Board item, GMP #2 exceeded available funding and required additional funding to proceed. As such, the Board approved an additional \$13,710,000 in funding for the overall project budget for the SMART Program Renovations. A Notice to Proceed (“NTP”) was issued on August 31, 2018, which required substantial completion no later than 868 days after the NTP date. On August 8, 2023, the Board approved to terminate, without cause, the Construction Manager at Risk Agreement with Gilbane Building Company for the SMART GOB Renovations project (P.001683). The remaining scope was “carved out” as a separate project (P.001683-RC1), and transitioned to Atlas Apex Roofing, LLC as a Construction Services Minor Project (“CSMP”).

A detailed “Project Performance Report” and “Board Action Timeline” for Stranahan High School can be found in **Appendix A**.

Key Parties	
Project Consultant	Wolfberg Alvarez
Construction Manager	Gilbane Building Co.
Project Financials <sup>1</sup>	
Original Budget	\$ 15,442,577
Current Budget	\$ 27,096,234
Key Dates	
Professional Services Agreement	August 16, 2016
Construction Services Agreement	November 1, 2016
GMP #1 (Single Point of Entry)	July 25, 2017
GMP #2	April 24, 2018
Construction Schedule	
NTP Date	August 31, 2018
Contractual Substantial Date	January 15, 2021
Contractual Construction Duration	868 days
Actual Construction Duration (through March 21, 2024)	2,029 days
Current Project Phase (through March 21, 2024)	Construction

*Note 1 Budget data obtained from “Current Cost Code Breakdown by Code” report in e-Builder, as of March 21, 2024.*



## “BIG 3” OVERVIEW (CONTINUED)

### Stranahan High School: Other Projects

The following table includes a listing of past and current projects for Stranahan High School, including the current budget and actuals approved. Data was obtained from the “Current Cost Code Breakdown by Code” report in e-Builder, as of March 21, 2024.

Project Name	Project No.	Current Budget	Actuals Approved
ADA Asphalt Walkway Routes and Aluminum Bleachers	P.002998	150,000	-
ADA Parking Lot Renovations	P.002898	51,134	29,784
ADA Stage Lift	P.002386	108,788	23,684
Avigilon Duress Button	P.002560	7,845	-
Cafeteria Additions / Renovations	P.002613	21,656,760	12,466,086
Covered Walkway	P.002986	600,000	-
Pool Repairs	P.001677	1,883,090	1,883,090
Portable Demolition	P.X0211P	43,400	-
School Choice Year 1	P.001700	99,851	99,851
Single Point of Entry - SMART Program	P.001683-SPE	380,303	380,303
SMART GOB Renovations	P.001683	27,096,234	22,855,419
SMART Replace AC Units Room 101B and 101C	P.001683-HVC	37,040	37,040
SMART Roofing Bldgs 2A, 2B, 2C, 8 & 9	P.001683-RC1	1,500,000	-
SMART Track Resurfacing	P.002107	324,337	324,336
Walk-In Cooler / Freezer	P.002179	210,000	-
Weight Room Renovations - SMART Program	P.001995	120,415	120,415
<b>Total</b>		<b>54,269,197</b>	<b>38,220,008</b>



## “BIG 3” OVERVIEW (CONTINUED)

### Blanche Ely High School: SMART GOB Renovations (P.001646)

On May 3, 2016, following the District’s decision to execute the “Big 3” SMART GOB Renovations projects utilizing a construction manager at risk delivery method (see “Initial Procurement” Section on page 10), the Board approved the Authorization to Advertise the Request for Qualifications (“RFQ”) No. 16-165C for Professional Design Services for Blanche Ely High School.

On June 28, 2016, during a Special Board Meeting, the Board approved the issuance of RFQ 16-192C for Construction Manager at Risk Services for Blanche Ely High School, SMART GOB Renovations, Project No. P.001646.

On August 16, 2016, the Board awarded and approved the Professional Services Agreement (“PSA”) with Wolfberg Alvarez & Partners in the amount of \$911,900. At the same meeting, District staff provided an update on the progress of RFQ 16-192C. A total of eleven (11) proposals were received in response to the solicitation.

On November 1, 2016, the Board approved the recommendation for award of RFQ 16-192C to the highest ranked firm, The Morganti Group, Inc., which included a lump sum pre-construction fee of \$98,000.

The scope of work was to include, but not be limited to, gymnasium accessibility, ADA stage lift, outdoor dining renovation, fire sprinklers, single point of entry, weight room renovation, HVAC improvements, building envelope improvements, STEM lab improvements, media center improvements, IAQ and fascia replacement. At the time of award, the total funds allocated for project scope was \$14,795,436, including soft costs.

On June 27, 2017, Guaranteed Maximum Price (“GMP”) Amendment #1 to the Construction Services Agreement was approved by the Board for single point of entry improvements in the amount of \$249,000. According to e-Builder schedule data, the project was certified for occupancy on August 13, 2018, and reached final completion on December 17, 2018.

A second and final GMP amendment was approved by the Board during a Special School Board Meeting on April 17, 2018, in the amount of \$17,992,000 for the remaining SMART Program improvements. According to the Executive Summary provided as part of the Board item, GMP #2 exceeded available funding and required additional funding to proceed. As such, the Board approved an additional \$7,310,000 in funding for the overall project budget for the SMART Program Renovations.

A detailed “Project Performance Report” and “Board Action Timeline” for Blanche Ely High School can be found in **Appendix B**.

Key Parties	
Project Consultant	Wolfberg Alvarez & Partners
Construction Manager	The Morganti Group, Inc.
Project Financials <sup>1</sup>	
Original Budget	\$ 14,795,436
Current Budget	\$ 21,735,436
Key Dates	
Professional Services Agreement	August 16, 2016
Construction Services Agreement	November 1, 2016
GMP #1 (Single Point of Entry)	June 27, 2017
GMP #2	April 17, 2018
Construction Schedule	
NTP Date	April 18, 2018
Contractual Substantial Date	August 1, 2020
Contractual Construction Duration	836 days
Actual Construction Duration (through March 21, 2024)	2,164 days
Current Project Phase (through March 21, 2024)	Construction

*Note 1 Budget data obtained from “Current Cost Code Breakdown by Code” report in e-Builder, as of March 21, 2024.*





## “BIG 3” OVERVIEW (CONTINUED)

### Blanche Ely High School: Other Projects

The following table includes a listing of past and current projects for Blanche Ely High School, including the current budget and actuals approved. Data was obtained from the “Current Cost Code Breakdown by Code” report in e-Builder, as of March 21, 2024.

Project Name	Project No.	Current Budget	Actuals Approved
Avigilon Duress Button	P.002574	7,845	-
Bldg 4 Reroof / Demo of Buildings	P.001385	667,714	665,537
Bus Loop Renovations	P.002893	4,900,000	184,700
Civil Work for Switch Gear Replacement	P.002342-CIV	268,232	218,851
Marquee Sign	P.002977	48,000	-
Repair Aluminum Covered Walkway including Lights	P.002971	139,584	-
School Choice Enhancement Project - Year 1	P.002230	100,000	100,000
Single Point of Entry - SMART Program	P.001646-SPE	249,000	239,469
SMART GOB Renovations	P.001646	21,735,436	20,578,024
Switch Gear Replacement	P.002342	1,031,768	726,310
Weight Room Renovations - SMART Program	P.001931	117,354	117,354
<b>Total</b>		<b>29,264,933</b>	<b>22,830,245</b>





## “BIG 3” OVERVIEW (CONTINUED)

### Northeast High School: SMART Program Renovations (P.001684)

On May 3, 2016, following the District’s decision to execute the “Big 3” SMART GOB Renovations projects utilizing a construction manager at risk delivery method (see “Initial Procurement” Section on page 10), the Board approved the Authorization to Advertise RFQ No. 16-166C for Professional Design Services for Northeast High School.

On June 28, 2016, during a Special Board Meeting, the Board approved the Authorization to Advertise RFQ 16-194C for Construction Manager at Risk Services for Northeast High School, SMART GOB Renovations, Project No. P.001684. On August 16, 2016, the Board awarded and approved the Professional Services Agreement with ACAI Associates, Inc. (“ACAI” or “Designer”) in the amount of \$955,000. At the same meeting, District staff provided an update on the progress of RFQ 16-192C. A total of eleven (11) proposals were received in response to the solicitation.

The District’s Qualification Selection Evaluation Committee held a meeting on August 24, 2016, to discuss their recommendation for the award of the Construction Services Agreement (“CSA”). The Board subsequently approved QSEC’s recommendation for award of the CSA on November 1, 2016, to Gilbane Building Company (“Gilbane” or “CMAR”), which included a lump sum pre-construction fee of \$125,000.

The scope of work was to include, but not be limited to, single point of entry, safety/security upgrades, fire sprinklers, fire alarm, weight room renovation, STEM lab improvements, HVAC improvements, electrical improvements, re-roofing, and ADA renovations related to educational adequacy. At the time of award, the total funds allocated for project scope included \$14,547,000, including soft costs.

During a Special Board Meeting on September 26, 2017, the Board approved the first Guaranteed Maximum Price (“GMP”) in the amount of \$601,436 for the Single Point of Entry (“SPE”) improvements as part of the Construction Services Agreement (“CSA”) with Gilbane. According to e-Builder schedule data, the project was certified for occupancy on April 4, 2018, and reached final completion on February 7, 2019.

Gilbane’s second GMP amendment was initially presented to the Board on April 24, 2018, in the amount of \$26,559,715. The second GMP exceeded available funds and required additional funding in the amount of \$16,910,000 to complete the remaining scope items. The Board item was postponed in order for staff to provide additional information and prepare “campus options” at a Board Workshop on June 19, 2018.

During the workshop, staff presented four (4) potential campus options for Northeast High School. Following the Board’s discussions, several members expressed a preference for “Option 3”. This option (also known as the “base recommendation”) proposed the demolition of Buildings 9, 10, 11, and 27, followed by site restoration and the construction of a new addition comprising 24 classrooms. The Board also suggested that the staff consider the demolition of Building 8, which houses the football locker room and the existing weight room. This would necessitate relocating the football locker room to Building 12, where the weight room was to be relocated as part of the original SMART Program improvements. Following this Board meeting, the District consulted with Heery and Atkins representatives to verify the scope items.

Key Parties	
<b>Project Consultant</b>	ACAI Associates, Inc.
<b>Construction Manager</b>	Pirtle Construction Company
Project Financials <sup>1</sup>	
<b>Original Budget</b>	\$ 14,426,000
<b>Current Budget</b>	\$ 24,748,401
Key Dates	
<b>Professional Services Agreement</b>	August 16, 2016
<b>Construction Services Agreement</b>	November 1, 2016
<b>GMP #1 (Single Point of Entry)</b>	September 26, 2017
<b>GMP #2 Approval</b>	April 21, 2020
Construction Schedule	
<b>NTP Date</b>	August 10, 2020
<b>Contractual Substantial Date</b>	November 6, 2022
<b>Original Construction Duration</b>	818 days
<b>Actual Construction Duration</b> (through March 21, 2024)	1,319 days
<b>Current Project Phase</b> (through March 21, 2024)	Construction

*Note 1 Budget data obtained from “Current Cost Code Breakdown by Code” report in e-Builder, as of March 21, 2024.*



## “BIG 3” OVERVIEW (CONTINUED)

### Northeast High School: SMART Program Renovations (P.001684)

The “base recommendation” and alternate options were brought before the Board on July 24, 2018 for approval, including the preparation and issuance of a new RFQ for design professional services, and construction manager at risk services. The item was postponed to the Special School Board Meeting on July 31, 2018, where the Board approved the base recommendation and Alternate #1, which included: removing all SMART scope associated with Building 8, Building 12 (associated with FISH room numbers 325, 325A, 325C, 325D, and 325E), remove scope to replace roof for Building 12 (scope for new weight room shall remain), adding air conditioning to both the boys’ and girls’ physical education locker rooms, as well as adding a New Flex Lab. This option required additional funding estimated to be \$5.98 million more than the existing funding available at the time (\$14,426,000), and the previously requested additional funding for Gilbane’s GMP #2 of \$16,910,000.

RFQ 19-077C for Professional Services for the New Addition and Renovation to Building 12 project was advertised on August 13, 2018. On November 7, 2018, the Board approved the Authorization to Advertise RFQ 19-091C for CMAR Services for New Additions and Renovation to Building 12 (Project No. P.002301). The Board approved the CSA on March 19, 2019, which was awarded to James B. Pirtle Construction Company, Inc. (“Pirtle” or “CMAR”) which included a lump sum pre-construction fee of \$131,000.

The scope of work was to include, but not be limited to, demolition of Buildings 8, 9, 10, 11, and 27 (including site restoration), renovations to Building 12 (new football locker room, three (3) general classrooms or one (1) athletic flex space, support space(s) required by Code and/or state regulations, Building 7 (improvements to include air conditioning of both PE locker rooms), new 24-classroom addition (with new flex lab), and other items that may be required to execute the Board approved scope. At the time of award, the total funds allocated for project scope included \$17,840,962, including soft costs.

On June 25, 2019, the Board approved staff’s recommendation to terminate without cause the CSA with Gilbane, as the parties could not reach an agreement on GMP #2. Following this termination, the Board approved to award the CSA to James B. Pirtle Construction Company on August 13, 2019, to complete the remaining scope items. The scope of work was to include, but not be limited to, safety/security upgrades, fire sprinklers, fire alarm, STEM lab improvements, HVAC improvements, electrical improvements, re-roofing, ADA restrooms related to educational adequacy, and other items that may be required to execute the Board approved scope.

On April 21, 2020, the Board approved the second GMP amendment in the amount of \$19,996,611 to complete the remaining scope for the SMART Program Renovations. The scope of work associated with GMP Amendment 2 included: fire alarm, fire sprinklers, safety/security upgrades, ADA renovations related to educational adequacy, re-roofing, electrical improvements, HVAC improvements, STEM Lab improvements. Scope to provide fire sprinklers to Buildings 1, 3, 4, 5, 6, 7, 8, 9, 10, 11, and 12 was reviewed by the Task Assigned District’s Chief Fire Official who determined that Buildings 1, 4, and 10 were the only buildings that required fire sprinklers. Buildings 2, 5, 6, 7, 8, 9, 11, and 12 did not require fire sprinklers, therefore, this scope of work was removed from the construction documents prior to bidding.

A detailed “Project Performance Report” and “Board Action Timeline” for Northeast High School can be found in **Appendix C**.



## “BIG 3” OVERVIEW (CONTINUED)

### Northeast High School: Other Projects

The following table includes a listing of past and current projects for Northeast High School, including the current budget and actuals approved. Data was obtained from the “Current Cost Code Breakdown by Code” report in e-Builder, as of March 21, 2024.

Project Name	Project No.	Current Budget	Actuals Approved
ADA Science Labs Remodeling	P.002444	150,000	20,990
ADA Parking Lot Renovations	P.002872	75,000	16,275
Avigilon Duress Button	P.002605	7,845	-
New Addition and Renovations to Building 12 SMART Program	P.002301	22,088,750	20,852,156
Pool Pump Replacement	P.003014	60,000	-
School Choice Year 1	P.001758	99,661	99,661
Single Point of Entry - SMART Program	P.001684-SPE	539,866	539,867
SMART Intercom Tie-in Bldg 29/30	P.002301-ELE	108,550	108,550
SMART Program Renovations	P.001684	24,748,401	20,565,437
SMART Weight Room Renovations	P.002016	120,864	120,864
<b>Total</b>		<b>47,998,937</b>	<b>42,323,800</b>



## RSM COMPARATIVE SCOPE ANALYSIS

### Overview

RSM performed a comparative analysis of the M.A.P.P.S.™ “School Deficiency Listings” and the executed scopes of work for the “SMART Program Renovations” projects for Stranahan, Blanche Ely, and Northeast High School. The primary objective of our analysis was to determine whether the items within the deficiency listings were incorporated into the scopes of work for each of the “Big 3” projects. The scope of our analysis focused on the items tagged as “GOB” within the deficiency listings, and did not include analysis of non-GOB items. As part of our analysis, we performed the following procedures for each of the “Big 3” schools:

- Obtained and reviewed the M.A.P.P.S.™ “School Deficiency Listings” to obtain an understanding of deficiency items included in the initial scope of the SMART Program.
- Obtained and reviewed the request for qualifications (“RFQ”) for design professional services, professional services agreements (“PSA”), PSA amendments, scope validation reports, etc.
- Obtained and reviewed the construction services agreements (“CSA”) and related amendments.
- Obtained and reviewed construction manager payment applications.

Using the documentation noted above, we compared the items in the deficiencies listings to the scope items included in the project documents for each project. The deficiency listings included quantities and/or units of measurement for each deficiency (e.g., square feet, linear feet, etc.). Validation of specific quantities, equipment items, and the technical aspects of the deficiencies falls outside of our expertise and the scope of our engagement. As such, our objective was to validate, more broadly, that the GOB-tagged deficiency items were addressed through SMART Program projects. For example, if the deficiency listing included multiple “mechanical” deficiencies at a particular building, we reviewed project documentation to determine whether mechanical improvements appeared to be included in the scope. Our analysis excluded the following:

- Validation of square footage
- Validation of specific quantities
- Assessment of whether the executed work adequately addressed deficiencies
- Evaluation of compliance with State Requirements for Educational Facilities (“SREF”) and District Standards.

The results of our analysis can be found on the following pages.



## RSM COMPARATIVE SCOPE ANALYSIS (CONTINUED)

### Legend

The following table includes the definitions of the classifications utilized to summarize the results of our comparative scope analysis.

Legend	
Symbol	Description
Y	Deficiency items appeared to be incorporated into the scope of work, or repaired prior to scope validation.
S	The majority of deficiency items appeared to be incorporated into the scope of work (75% or more of the deficiency items, based on the total M.A.P.P.S.™ “repair cost”).
U	Certain deficiencies may have been incorporated into the scope of work for a given discipline category (i.e., mechanical, roofing, etc.); however, it is unclear based on our review of project documentation and further explanation from the PM/OR whether deficiencies were addressed (refer to <b>Observation #3</b> ). The portion of deficiencies categorized as “unknown” was quantified using the M.A.P.P.S.™ “repair cost” from the school deficiency listings. This figure is presented for illustrative purposes only.
N	Deficiency item(s) within a particular discipline did not appear to be included in the final scope of work.
D	Building was demolished prior to scope validation, or de-scoped during design or construction.



## RSM COMPARATIVE SCOPE ANALYSIS (CONTINUED)

### Stranahan High School

The following matrix includes the results of our comparative scope analysis for Stranahan High School. Additional notes can be found on the next page.

RSM Comparative Scope Analysis: Stranahan High School											
Bldg.	M.A.P.P.S Repair Cost	Electrical	Exterior	Fire and Security	Interior	Mechanical	Other	Roofing	Site	Specialties	Technology
Site	2,624,422	N = \$157K <sup>3</sup>	Y	Y	N/A	N/A	Y	N = \$149K <sup>3</sup>	N/A	N/A	Note 1
1	3,008,687	Y	Note 2	Y	Y	Y	N/A	Y	N = \$21K <sup>3</sup>	N/A	N/A
2	1,040,921	Note 2	N/A	Y	N/A	Y	N/A	Y	N/A	N/A	N/A
3	93,328	N/A	N/A	N/A	N/A	Y	N/A	Y	N/A	N/A	N/A
4	1,322,439	N/A	Note 2	N/A	N = \$31K <sup>3</sup>	S	Y	Y	N/A	N/A	N/A
5	1,067,669	N/A	U = \$13K	N/A	Y	S	Y	Y	N/A	N/A	Note 1
6	967,596	N/A	U = \$16K	N/A	Y	Y	Y	Y	N/A	N/A	N/A
7	1,120,129	N/A	U = <\$1K	N/A	Y	Y	Note 2	Y	N/A	N/A	N/A
8	533,612	Note 2	N/A	N/A	N/A	Y	N/A	Y	N/A	N/A	N/A
9	1,021,968	N/A	N/A	Y	N/A	S	Y	Y	N/A	N/A	Note 1
10	687,513	Y	N/A	N/A	N/A	Y	N/A	Y	N/A	Y	N/A
11	9,764	N/A	N/A	N/A	N/A	N/A	N/A	N = \$10K <sup>3</sup>	N/A	N/A	N/A
12	1,189,874	Y	N = \$119K <sup>3</sup>	N/A	N/A	Y	N/A	N = \$224K <sup>3</sup>	N/A	N/A	N/A
13	75,292	N/A	N/A	N/A	N/A	Note 2	N/A	Y	N/A	N/A	N/A
14	337,969	N/A	U = \$5K	N/A	N/A	Y	N/A	Y	N/A	N/A	N/A
15	654,810	Y	N/A	N/A	N/A	Note 2	N/A	Y	N/A	N/A	N/A
16	120,856	N/A	Note 2	N/A	N/A	Note 2	N/A	Note 2	N/A	N/A	N/A
17	160,254	N/A	N/A	N/A	N/A	Y	Note 2	Y	N/A	N/A	N/A
18	7,608	N/A	N/A	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A
20	362,997	N/A	N/A	N = \$9K <sup>3</sup>	N/A	N/A	N/A	Y	N/A	N/A	Note 1
21	93,409	N/A	N/A	N/A	N/A	Y	N/A	Y	N/A	N/A	N/A
22	12,436	N/A	N/A	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A
24	5,950	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A	N/A	N/A
26	1,888	N/A	N/A	N/A	N/A	N/A	N/A	N = \$2K <sup>3</sup>	N/A	N/A	N/A
27	1,217	N/A	N/A	N/A	N/A	N/A	N/A	N = \$1K <sup>3</sup>	N/A	N/A	N/A
85	2,277	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A	N/A	N/A
<b>Total</b>	<b>16,524,885</b>										

Y = Included in scope S = Majority of deficiency items included in scope U = Unknown N = Not in scope D = Descoped or demolished

Note 1 Technology enhancements were executed separately from SMART Program Renovations projects.

Note 2 As part of our initial analysis, the deficiency item did not appear to be included in the scope of work or addressed through repairs; however, upon further request for information, the PM/OR asserted that the deficiency item was addressed. Refer to **Appendix E** for additional information/explanation.

Note 3 According to the PM/OR, deficiency item was not included in the scope of work. Refer to **Appendix E** for additional information/explanation.



## RSM COMPARATIVE SCOPE ANALYSIS (CONTINUED)

### Stranahan High School (Continued)

The following table includes the deficiency items that may have been incorporated into the scope of work, but could not be validated through our review of project documentation, as of the date of this report.

U				
Index	M.A.P.P.S Deficiency Description	M.A.P.P.S Category	Building #	M.A.P.P.S Repair Cost
1	The Aluminum Window Is Damaged And Requires Replacement	Exterior	5, 6, 7, 14	33,870
Total				33,870

The following table includes deficiency item(s) that did not appear to be included in the final scope of work.

N				
Index	M.A.P.P.S Deficiency Description	M.A.P.P.S Category	Building #	M.A.P.P.S Repair Cost
1	Reroofing with new Decking Required (Broward CPS)	Roofing	11, 12, 26, 27	236,013
2	The Pole Lighting Is Damaged And Should Be Replaced	Electrical/Site	Site, 1	178,069
3	Aluminum Covered Walkways Require Replacement	Roofing	Site	148,539
4	The Aluminum Window Is Damaged And Requires Replacement	Exterior	12	119,366
5	The HVAC Terminal Device Requires Replacement	Interior	4	31,253
6	Install Fire Sprinklers	Fire and Security	20	8,604
7	Roof Equipment requires Cabling	Roofing	26	671
Total				722,515



## RSM COMPARATIVE SCOPE ANALYSIS (CONTINUED)

### Blanche Ely High School

The following matrix includes the results of our comparative scope analysis for Blanche Ely High School. Additional notes can be found on the next page.

RSM Comparative Scope Analysis: Blanche Ely High School										
Bldg.	M.A.P.P.S Repair Cost	Exterior	Fire & Security	Mechanical	Misc.	Other	Roofing	Specialties	Structural	Technology
Site	686,106	N/A	N/A	N/A	N/A	Y	Y	N/A	N/A	Note 1
1	4,582,146	N/A	Y	S	N = \$18K <sup>3</sup>	N = \$160K <sup>3</sup>	Y	N/A	N/A	Note 1
2	878,073	Y	Y	S	N = \$9K <sup>3</sup>	Y	Y	N/A	N/A	Note 1
3	57,989	D	D	D	D	D	D	D	D	D
4	1,163,502	U = \$20K	Y	S	N/A	N/A	Y	N = \$6K <sup>3</sup>	N/A	N/A
5	82,197	D	D	D	D	D	D	D	D	D
7	70,335	D	D	D	D	D	D	D	D	D
9	49,925	D	D	D	D	D	D	D	D	D
10	122,867	N = \$18K <sup>3</sup>	N = \$12K <sup>3</sup>	N = \$75K <sup>3</sup>	N/A	N/A	Y	N/A	N/A	N/A
11	118,515	N = \$21K <sup>3</sup>	N = \$12K <sup>3</sup>	N = \$68K <sup>3</sup>	N/A	N/A	Y	N/A	N/A	N/A
13	704,106	N/A	N/A	Y	N/A	Y	N/A	N/A	N/A	N/A
14	1,567,790	Y	N/A	S	Y	N/A	Note 2	N/A	N/A	N/A
15	165,585	N/A	N/A	Y	N/A	N/A	Y	N/A	N/A	N/A
16	82,281	N/A	N/A	Y	N/A	N/A	Y	N/A	N/A	N/A
17	960,395	N/A	N/A	Y	N/A	N/A	Y	N/A	N/A	N/A
18	636,163	Note 2	N/A	N/A	N/A	N/A	Y	N/A	Note 2	N/A
20	137,539	N/A	N/A	Y	N/A	N/A	Y	Y	N/A	N/A
21	94,483	N = \$15K <sup>3</sup>	N/A	N = \$55K <sup>3</sup>	N/A	N/A	Y	N/A	N/A	N/A
26	27,357	N/A	N/A	Y	N/A	N/A	Y	N/A	N/A	Note 1
27	2,014	N/A	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A
28	1,343	N/A	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A
30	503	N/A	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A
Total	12,191,214									
Y = Included in scope   S = Majority of deficiency items included in scope   U = Unknown   N = Not in scope   D = Descoped or demolished										

Note 1 Technology enhancements were executed separately from SMART Program Renovations projects.

Note 2 As part of our initial analysis, the deficiency item did not appear to be included in the scope of work or addressed through repairs; however, upon further request for information, the PM/OR asserted that the deficiency item was addressed. Refer to **Appendix E** for additional information/explanation.

Note 3 According to the PM/OR, deficiency item was not included in the scope of work. Refer to **Appendix E** for additional information/explanation.





## RSM COMPARATIVE SCOPE ANALYSIS (CONTINUED)

### Blanche Ely High School (Continued)

The following table includes the deficiency items that may have been incorporated into the scope of work, but could not be validated through our review of project documentation, as of the date of this report.

U				
Index	M.A.P.P.S Deficiency Description	M.A.P.P.S Category	Building #	M.A.P.P.S Repair Cost
1	Catwalk Requires Repair/Replacement	Exterior	4	20,044
Total				20,044

The following table includes deficiency item(s) that did not appear to be included in the final scope of work.

N				
Index	M.A.P.P.S Deficiency Description	M.A.P.P.S Category	Building #	M.A.P.P.S Repair Cost
1	Provide renovation of restrooms associated with educational adequacy renovations	Other	1	160,107
2	The Air Handler HVAC Component Requires Replacement	Mechanical	10, 11, 21	128,245
3	The 4 X 6 Exhausts/Ventilators Require Replacement	Misc.	1, 2	27,474
4	The Wood Window Is Damaged And Requires Replacement	Exterior	10, 11	25,643
5	Install Fire Sprinklers	Fire and Security	10, 11	24,683
6	The Mechanical / HVAC Piping / System Is Beyond Its Useful Life	Mechanical	10, 11	21,010
7	Duct Heater Requires Replacement	Mechanical	10, 11, 21	15,457
8	The Aluminum Window Is Damaged And Requires Replacement	Exterior	21	14,482
9	The Exterior Requires Painting	Exterior	10, 11	13,314
10	Controls Are Inadequate And Should Be Replaced With DDC Controls	Mechanical	10, 11	12,068
11	Ductwork Requires Replacement	Mechanical	10, 11, 21	8,049
12	Air Compressor is Inoperable and Requires Replacement	Specialties	4	6,172
13	The Exterior Condenser Requires Replacement	Mechanical	21	5,798
14	Exhaust Fan Ventilation Requires Replacement	Mechanical	10, 11	4,216
15	Test And Balancing Required	Mechanical	10	1,986
16	Repair HVAC Piping	Mechanical	21	1,603
17	Duct Damper Requires Replacement	Mechanical	10	169
Total				470,476



## RSM COMPARATIVE SCOPE ANALYSIS (CONTINUED)

### Northeast High School

The following matrix includes the results of our comparative scope analysis for Northeast High School. Additional notes can be found on the next page.

RSM Comparative Scope Analysis: Northeast High School											
Bldg.	M.A.P.P.S Repair Cost	Electrical	Exterior	Fire and Security	Interior	Mechanical	Other	Roofing	Site	Specialties	Technology
Site	2,063,730	N/A	N/A	Y	N/A	Note 2	Y	N = \$106K <sup>3</sup>	N/A	N/A	Note 1
1	4,542,239	Note 2	N/A	Y	N/A	S	Y	Y	N = \$32K <sup>3</sup>	N/A	Note 1
2	401,785	N = \$26K <sup>3</sup>	N = \$34K <sup>3</sup>	N/A	N/A	Y	N/A	Y	N/A	N/A	N/A
3	1,133,079	Y	N/A	D	N/A	Y	Y	Y	N/A	N/A	Note 1
4	628,310	N/A	N = \$50K <sup>3</sup>	Y	N = \$43K <sup>3</sup>	Y	N/A	Y	N/A	N/A	N/A
5	364,987	N/A	N/A	D	N/A	S	N/A	Y	Note 2	N/A	N/A
6	227,794	N/A	N/A	N/A	N/A	S	N/A	Y	N/A	N/A	N/A
7	248,923	N/A	Note 2	N/A	N/A	Note 2	N/A	Y	N/A	N/A	N/A
8	296,204	D	D	D	D	D	D	D	D	D	D
9	292,132	D	D	D	D	D	D	D	D	D	D
10	1,847,175	D	D	D	D	D	D	D	D	D	D
11	652,922	D	D	D	D	D	D	D	D	D	D
12	1,269,966	N/A	N/A	D	N/A	Y	Note 2	Y	N/A	U = \$413K	N/A
14	121,323	D	D	D	D	D	D	D	D	D	D
15	5,077	N/A	N/A	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A
17	561,930	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A	N/A	N/A
18	5,014	D	D	D	D	D	D	D	D	D	D
20	41,104	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A	N/A	N/A
25	12,028	N/A	N/A	N/A	N/A	N/A	N/A	Y	N/A	N/A	N/A
27	16,596	D	D	D	D	D	D	D	D	D	D
28	6,832	N/A	N/A	N/A	N/A	N = \$7K	N/A	N/A	N/A	N/A	N/A
85	172,242	N/A	N/A	N/A	N/A	Y	N/A	Y	N/A	N/A	N/A
86	17,225	N/A	N/A	N/A	N/A	Y	N/A	Y	N/A	N/A	N/A
Total	14,928,617										

Y = Included in scope S = Majority of deficiency items included in scope U = Unknown N = Not in scope D = Descoped or demolished

Note 1 Technology enhancements were executed separately from SMART Program Renovations projects.

Note 2 As part of our initial analysis, the deficiency item did not appear to be included in the scope of work or addressed through repairs; however, upon further request for information, the PM/OR asserted that the deficiency item was addressed. Refer to **Appendix E** for additional information/explanation.

Note 3 According to the PM/OR, deficiency item was not included in the scope of work. Refer to **Appendix E** for additional information/explanation.



## RSM COMPARATIVE SCOPE ANALYSIS (CONTINUED)

### Northeast High School (Continued)

The following table includes the deficiency items that may have been incorporated into the scope of work, but could not be validated through our review of project documentation, as of the date of this report.

U				
Index	Deficiency Description	Category	Building #	Total Repair Cost
1	The Chemistry Lab Fume Hood(s) Require Replacement	Specialties	12	413,048
Total				413,048

The following table includes deficiency item(s) that did not appear to be included in the final scope of work.

N				
Index	Deficiency Description	Category	Building #	Total Repair Cost
1	Aluminum Covered Walkways Require Replacement	Roofing	Site	105,908
2	The Aluminum Storefront Exterior Door Requires Replacement	Exterior	4	50,006
3	The Overhead Door Requires Replacement	Interior	4	43,435
4	The Metal Exterior Door Requires Replacement	Exterior	2	34,029
5	The Pole Lighting Is Damaged And Should Be Replaced	Site	1	31,665
6	The Panelboard Requires Replacement	Electrical	2	25,793
7	The Package Unit HVAC Component Requires Replacement	Mechanical	28	6,832
Total				297,668



## OBJECTIVES AND APPROACH

### Objectives

In conjunction with our quarterly internal audit procedures related to the District's administration of capital construction, RSM performed a comparative analysis of the “School Deficiency Listings” developed as part of the 2014 Facility Needs Assessment, and the various scopes of work executed for Stranahan High School, Northeast High School, and Blanche Ely High School.

### Approach

Our audit approach to this work included the following procedures:

- For the following schools/projects, we conducted a comparative analysis of the “School Deficiency Listings” and the executed scopes of work for the following schools/projects:
  - Stranahan High School (GOB Renovations and Cafeteria Additions / Renovations)
  - Northeast High School (GOB Renovations and New Addition and Renovations to Bldg. 12)
  - Blanche Ely High School (GOB Renovations, Weight Room Renovations, and Bldg. 4 Reroof / Demo of Buildings)
- We performed the following procedures as a part of our work:
  - Conducted interviews with key stakeholders to obtain an understanding of each project's history. Key stakeholders included, but were not limited to, Board advisory committees, school administrators, Program Manager/Owner's Representative, Office of Capital Programs, design and construction professionals, etc.
  - Reviewed the School Deficiency Listings to obtain an understanding of needs identified prior to scope creation
  - Obtained an understanding of how project scope development was considered as part of District long-term planning
  - Determined what analysis (i.e., Castaldi Analysis / destructive testing) were performed or considered during scope creation for each project
  - Obtained and reviewed the District's 5-year capital plan to gain an understanding of what projects and/or scope items were funded at program inception
  - Reviewed key contractual documents to obtain an understanding of project scope (i.e., professional services agreements, construction services agreements, guaranteed maximum price (“GMP”) amendments, executed change orders, etc.)
  - Reviewed School Board meeting minutes and agendas and documented Board approval of changes to the scope of work and budget
  - Reviewed Bond Oversight Committee (“BOC”) meeting minutes and agendas
  - Conducted on-site walkthroughs at Stranahan, Northeast, and Blanche Ely High School
  - For each project, we performed testing to validate that S/M/WBE goals are consistent with other SMART projects and performed testing to validate monitoring of contractor performance relative to goals

### Reporting

At the conclusion of our procedures, we summarized our findings into this report. We have reviewed the results of our testing with OCA, the CPCM and PM/OR teams, and incorporated management's response herein.



## OBSERVATIONS

### “BIG 3” PROJECT ANALYSIS

#### OBSERVATION

#### 1. 2014 Facility Needs Assessment

#### DETAIL

Through our comparative scope analysis and inquiry with stakeholders, we noted deficiencies related to the execution and documentation of the 2014 Facility Needs Assessment, and the prioritization of project scopes. Further, while assessment data was provided for individual schools, stakeholders noted that a comprehensive final report was not provided at the conclusion of the 2014 Facility Needs Assessment. Detailed observations are described below.

##### **A. Documentation of Deficiencies**

Through our review of the deficiency listings and the scope validation reports generated by the project consultants for the “Big 3” schools, we noted several issues related to the documentation of the deficiencies captured as part of the 2014 Facility Needs Assessment. Specifically, we noted the following:

- Lack of specificity regarding the exact locations of deficiencies and the specific items they pertain to. For example, for Blanche Ely High School, Building 1, the Needs Assessment identified ten (10) exhaust fans that required replacement. The project consultant noted in their “Program Validation Report” that approximately twenty-two (22) fans were found on the roof that were not operational. This example also highlights that the full extent of the deficiencies may not have been captured, or conditions in the field may have changed between the needs assessment and scope validation.
- Project consultants often could not locate items identified in the deficiency listings. For example, for Northeast High School, Building 1, the Needs Assessment identified four (4) overhead doors that required replacement. The project consultant noted in their “Program Validation Report” that overhead doors were not located at this building.
- Certain items within the deficiency listing appeared to be duplicative or redundant. For example, for Stranahan High School, Building 1, the deficiency listing included \$67,292 for “controls that require repair” and \$198,243 for “controls are inadequate and should be replaced with DDC controls”.
- Items within the deficiency listing may have been miscategorized (i.e., “electrical” items categorized as “mechanical”).

Insufficient documentation of deficiencies may lead to misallocation of resources and delays in the scope validation process. It may also hinder effective decision-making, budgeting, and long-term facility planning, as the results of the facility condition assessments (“FCA”) are used as the basis for both capital and maintenance programs.

##### **B. Scope Prioritization and Strategic Planning**

Through our review of the deficiency listings and project documentation, we noted inherent issues with the ranking or prioritization of deficiencies and scope items from the 2014 Facility Needs Assessment. Based on our review of the school deficiency listings for the “Big 3” schools, it appeared that the District’s ranking or prioritization of deficiencies did not consider the critical path of construction. For example, “re-roofing” was categorized as “priority 1”, or “mission critical”, while mechanical or HVAC improvements were primarily priority 2 or 3.

*(continued on next page)*



## OBSERVATIONS (CONTINUED)

### “BIG 3” PROJECT ANALYSIS

OBSERVATION	1. 2014 Facility Needs Assessment (Continued)
DETAIL	<p><b>B. <u>Scope Prioritization and Strategic Planning (Continued)</u></b></p> <p>As noted in the <i>Final Report of the Twentieth Statewide Grand Jury</i>, this indicates a lack of strategic planning, as lower priority renovations, such as HVAC improvements, often must be completed either prior to, or in coordination with roofing. Further, we noted that roofing projects addressing priority 1 or mission critical deficiencies have not been fully completed at Stranahan or Northeast High School.</p> <p>A lack of strategic planning may result in the inefficient use of resources, project delays, and increased costs. Further, delays in addressing high priority deficiencies may increase the risk of escalated repair costs due to economic factors and worsening conditions over time, potential safety hazards, and compromised structural integrity that could lead to emergency situations, especially during severe weather conditions.</p> <p><b>C. <u>Final Deliverables</u></b></p> <p>During interviews, stakeholders noted that a comprehensive final report summarizing the results of the 2014 Facility Needs Assessment was not provided or presented to the Board at the conclusion of the assessment. RSM reviewed historical Board meeting minutes between 2014 and 2015, and confirmed that a final report was not presented to the Board as part of a regular or special meeting.</p> <p>Section 2.04 of the School Board of Broward County’s (“SBBC”) Agreement with Jacobs Project Management Co. states that Jacobs “<i>shall present its final report to the SBBC summarizing its findings and recommendation with respect to the District’s 5-year and 10-year Capital Improvement Plans.</i>”</p> <p>While the results of the Needs Assessment are documented in M.A.P.P.S.™, Jacobs’ assessment and capital planning database, and assessment data is publicly available on the District’s website, it is unclear whether a final comprehensive district-wide summary was provided to the District. Without a final report, stakeholders may not have access to a comprehensive overview of the District’s facilities, impeding strategic decision-making regarding capital investments, maintenance prioritization, and long-term planning.</p>
RECOMMENDATION	<p>We understand the District recently issued RFP 24-274 for “Facility Condition Assessment and Space Utilization Studies” on March 7, 2024, as part of the District’s efforts to develop a long range facilities plan. For future facility condition assessments, and as part of strategic planning efforts, we recommend the following:</p> <ul style="list-style-type: none"> <li>We recommend the District review the methodology for documenting and reporting deficiencies as part of future needs assessments to verify that sufficient information is provided to inform decision-making. Deficiency documentation should include clear, detailed descriptions of each issue, photographic evidence for each deficiency, and specific identifiers such as equipment serial numbers or room numbers.</li> </ul> <p style="text-align: right;"><i>(continued on next page)</i></p>



OBSERVATIONS (CONTINUED)

“BIG 3” PROJECT ANALYSIS	
OBSERVATION	1. 2014 Facility Needs Assessment (continued)
RECOMMENDATION	<ul style="list-style-type: none"><li>The District, in conjunction with the professional services firm hired to conduct the FCA should develop and document prioritization methodology. Prioritization should consider the logical sequence of projects where the completion of one discipline (e.g., mechanical renovations) logically precedes another (e.g., roofing) to minimize re-work and optimize project timelines.</li><li>The District should verify that all deliverables outlined in the FCA consultant’s agreement are received prior to final payment.</li></ul> <p>In addition, the District may also consider seeking feedback from current project consultants and construction managers to identify and document lessons learned from the 2014 Facility Needs Assessment.</p>
MANAGEMENT RESPONSE	<p><b>PM/OR Response:</b> The District agrees with the recommendation. RFP 24-274, which is currently in the solicitation phase, includes the requirement to provide detailed written descriptions of each issue, plan notations, and photographic documentation. The RFP also includes a requirement for barcoding assets.</p> <p>The RFP includes supplemental services for project prioritization to support the District’s annual capital program. In addition, the RFP contains a requirement to implement a data input and reporting system that gives visibility to the overall condition of facilities in the District, recommendations for needed maintenance, repairs, restorations, and replacements, cost and schedule, and prioritization of work.</p> <p>The District shall verify that all deliverables outlined in the FCA consultant’s agreement are received prior to final payment. Prior to the start of work, expectations will be set with the consultant to establish deliverables. Staff will monitor receipt of deliverables and adjust payments as necessary.</p> <p>During the planning and early design phases of the SMART projects, and during construction, many consultants shared their views of the 2014 Needs Assessment data, and scope concerns. These “lessons learned” were taken into consideration while preparing the current RFP.</p>



## OBSERVATIONS (CONTINUED)

### “BIG 3” PROJECT ANALYSIS

OBSERVATION	2. Castaldi Analysis
DETAIL	<p>Between 2005 and 2009, Castaldi analyses were performed by third-party consultants for each of the “Big 3” schools. The analyses indicated that it would be more economical to replace, rather than renovate certain buildings at each school. Through our analysis, we noted that for the 27 buildings listed below, renovations were performed as part of the SMART Program, despite previous conclusions from third-party consultants and the Florida Department of Education that it would be more economical to replace these buildings. Based on our discussions with stakeholders and review of project documentation, it is unclear whether the results of past Castaldi analyses were considered as part of scope development for the “Big 3” schools.</p> <ul style="list-style-type: none"> <li>• <b>Stranahan High School:</b> Buildings 2-16</li> <li>• <b>Blanche Ely High School:</b> Buildings 4, 11 &amp; 20</li> <li>• <b>Northeast High School:</b> Buildings 1-7, 12 &amp; 15</li> </ul> <p>A Castaldi analysis is a formula-based evaluation tool used to determine the economic feasibility of replacing versus renovating school buildings, focusing on factors such as current age, general condition, code compliance, educational adequacy, and environmental conditions. The analysis is typically performed by a third-party consultant or engineer to determine the most cost-effective option between renovation and replacement by comparing the costs associated with each choice.</p> <p>Renovating buildings that are beyond their useful life or that require extensive updates may result in higher costs over time than replacement.</p>
RECOMMENDATION	As part of the District’s efforts to develop a long range facilities plan, we recommend the District perform an analysis to identify schools and/or individual buildings that may be candidates for Castaldi analysis.
MANAGEMENT’S RESPONSE	<b>PM/OR Response:</b> The District agrees with the recommendation. The Facilities Needs Assessment will generate Facility Condition Indices that can be used to determine candidates for Castaldi analyses.





## OBSERVATIONS (CONTINUED)

### “BIG 3” PROJECT ANALYSIS

#### OBSERVATION

#### 3. Unaddressed Deficiencies from the 2014 Facility Needs Assessment

#### DETAIL

Through our comparative analysis of the 2014 Facility Needs Assessment and the executed scopes of work for the “Big 3” schools, we noted that deficiency items included in the initial scope of the GOB Program may not have been incorporated into the final scope for construction. The following table summarizes the results of our comparative analysis (refer to the “RSM Comparative Scope Analysis” section on page 18 for additional information).

RSM Comparative Scope Analysis Results					
School	Unknown (“U”) <sup>1</sup>	% of Total Repair Cost	Not in Scope (“N”) <sup>1</sup>	% of Total Repair Cost	M.A.P.P.S Repair Cost
Stranahan HS	33,870	< 1%	722,515	4%	16,524,885
Blanche Ely HS	20,044	< 1%	470,476	4%	12,191,214
Northeast HS	413,048	3%	297,668	2%	14,928,617
<b>Total</b>	<b>466,962</b>		<b>1,490,659</b>		<b>43,644,716</b>

Note <sup>1</sup> Quantified using the M.A.P.P.S.™ “repair cost” from the school deficiency listings. Figures are presented for illustrative purposes only.

Of the \$43.6 million in total deficiency “repair costs” for the “Big 3”, approximately \$1.9 million (4%) could not be validated through our review of project documentation, as of the date of this report. For the deficiency items that did not appear to be included in the scopes of work for the “Big 3”, it is unclear whether these items were formally de-scoped or presented to the Board for approval.

Upon further request, the PM/OR provided additional information and clarification regarding items that did not appear to be included in the scope of work (see **Appendix E**). According to the PM/OR, certain deficiency items were determined to be in good condition and/or in compliance with code, or could not be located during scope validation (see **Observation #1**).

#### RECOMMENDATION

We understand the District recently issued RFP 24-274 for “Facility Condition Assessment and Space Utilization Studies” on March 7, 2024, as part of the District’s efforts to develop a “long range facilities plan”. For future facility condition assessments (“FCA”), and as part of strategic planning efforts, we recommend the District establish procedures to verify that items identified in the initial project scopes are carried over or appropriately adjusted in the final scope of work. While we recognize that scope modifications may be necessary, it is crucial that any changes, especially the removal of scope items, are thoroughly documented along with their rationale. This approach will support transparency, facilitate project management, and enhance stakeholder communication.



OBSERVATIONS (CONTINUED)

“BIG 3” PROJECT ANALYSIS	
OBSERVATION	3. Unaddressed Deficiencies from the 2014 Facility Needs Assessment (Continued)
MANAGEMENT’S RESPONSE	Refer to <b>Appendix E</b> for the PM/OR’s response.



## OBSERVATIONS (CONTINUED)

### “BIG 3” PROJECT ANALYSIS

#### OBSERVATION

#### 4. S/M/WBE Compliance and Monitoring

#### DETAIL

As part of our procedures, RSM selected a sample of ten (10) projects in addition to the “Big 3” schools and performed testing to validate monitoring of contractor S/M/WBE participation relative to goals. Through our analysis, we noted the following:

##### A. S/M/WBE Compliance

Through our review of S/M/WBE compliance data from the District’s supplier diversity management software, B2GNow, we noted that ten (10) of eleven (11) projects reviewed did not meet their contractual S/M/WBE participation commitment. Further, through discussions with the Economic Development & Diversity Compliance (“EDDC”) Department, we noted that S/M/WBE compliance data is not available in B2GNow for Stranahan (P.001683) or Blanche Ely High School (P.001646).

According to the EDDC Department, the Department monitors projects that were awarded after the implementation of School Board Policy 3330 (“Supplier Diversity Outreach Program”), effective July 1, 2017. RSM reviewed the contract documents for Stranahan and Blanche Ely High School, and noted that while the original construction services agreements were approved in November 2016, the guaranteed maximum price (“GMP”) amendments were approved after July 1, 2017.

The following table provides a breakdown of S/M/WBE compliance for the “Big 3” projects and our ten (10) additional samples.

School	Prime Payments	S/M/WBE Payments	S/M/WBE Participation	Commitment Participation Goal	Variance
Northeast High School (P.001684) <sup>1</sup>	\$ 14,855,003	\$ 5,623,781	37.86%	42.51%	-4.65%
Stranahan High School (P.001683) <sup>2</sup>	\$ 15,780,994	\$ 7,883,442	49.96%	28.20%	21.76%
Blanche Ely HS (P.001646) <sup>2</sup>	\$ 15,272,709	\$ 5,313,565	34.79%	27.96%	6.83%
Sampled Projects <sup>1</sup>	\$ 128,200,318	\$ 35,130,414	27.40%	40.46% <sup>3</sup>	-13.06%

Note 1 Data obtained from B2GNow.

Note 2 Data obtained from the EDDC Department, as compliance data is not available in B2GNow for Stranahan (P.001683) or Blanche Ely High School (P.001646).

Note 3 Average S/M/WBE participation goal for our ten (10) sampled projects.

##### B. S/M/WBE Data Monitoring

Through our testing and review of contract and payment data from B2GNow, we noted discrepancies between the data reported within the system and source documentation, such as contract documents and contractor payment applications.

(continued on next page)



## OBSERVATIONS (CONTINUED)

### “BIG 3” PROJECT ANALYSIS

OBSERVATION	4. S/M/WBE Compliance and Monitoring (Continued)
DETAIL	<p><b>B. <u>B2GNow Data Monitoring (continued)</u></b></p> <p>Specifically, we noted the following:</p> <ul style="list-style-type: none"> <li>For 10 of 11 projects reviewed, the total contract value shown in B2GNow did not agree to the “Contract Sum to Date” in the contractor’s most recent payment application. Within a contractor payment application, the Contract Sum to Date is calculated as the “Original Contract Sum” plus or minus “Net Change by Change Orders”. The Contract Sum to Date may change throughout the lifecycle of project, and as such, must be updated as change orders are issued.</li> <li>For 11 of 11 projects reviewed, the total amount paid to prime contractors reported in B2GNow did not agree to the “Total Earned Less Retainage” in the contractor’s most recent payment application.</li> </ul> <p>RSM conducted an interview with BCPS’ Economic Development &amp; Diversity Compliance (“EDDC”) department on March 8, 2024, to discuss the District’s process for monitoring S/M/WBE compliance. During our discussion, it was noted that the District’s process for monitoring and updating B2GNow is manual in nature, and relies on District staff and third-party contractors to input and update information each month. As of the date of this report, B2GNow is not integrated with the District’s ERP system (SAP).</p> <p>The manual nature of the District’s process increases the likelihood of errors and inconsistencies. Inaccurate data within B2GNow may hinder the District’s ability to effectively monitor contractor compliance with S/M/WBE requirements, and may lead to inaccurate reporting to District stakeholders.</p>
RECOMMENDATION	<p>We recommend EDDC perform a reconciliation to determine whether the contract and payment data captured in B2GNow agrees to the relevant contracts and the District’s accounting records. Further, the District may consider conducting a review of the current capabilities of B2GNow to assess its potential for integration with SAP. Integrating B2GNow with SAP may help streamline the monitoring process by automating the updating of contract and payment information as payments are made and contract changes occur. This integration would not only reduce the manual workload on District staff, but also enhance data accuracy and reliability.</p>



## OBSERVATIONS (CONTINUED)

### “BIG 3” PROJECT ANALYSIS

OBSERVATION	4. S/M/WBE Compliance and Monitoring (Continued)
MANAGEMENT’S RESPONSE	<p><b>PM/OR Response:</b> The PMOR has three staff assigned to EDDC as staff augmentation. AECOM has no management or reporting responsibilities for any of the EDDC tasks.</p> <p><b>EDDC Response:</b> EDDC's crucial role in monitoring S/M/WBE commitment participation progress on SMART projects is a continuous process that spans the project's entire life. The "status" report provides a snapshot of the S/M/WBE participation attained to date and is a key indicator of the contract progress within the project completion phase. Once awarded, these are the monitoring activities that transpire during the project's lifecycle and a provided list of varying contract deviations that can impact the committed participation on a project.</p> <p>EDDC monitoring commences when an affirmative procurement initiative (API) is assigned to the project by the goal-setting committee (GSC). After the assignment of the API by the GSC, the project's life cycle is in its infancy. The life cycle includes the process of cycling through the procurement process (advertisement of the project, pre-bid conference, bid opening, etc.), the project being approved by the School Board of Broward County (SBBC), manual input of the contract data by EDDC staff into the District's supplier diversity management software, B2GNow, inputting of prime and subcontractor payment data in B2GNow by the prime vendor, confirmation of payment data by Subcontractor in B2GNow, and constant monitoring of the S/M/WBE commitment participation by EDDC staff. Monitoring of the S/M/WBE commitment participation ends when the final retainage has been paid by the School Board of Broward County (SBBC) to the prime contractor and the prime contractor has released and recorded all retainage payments owed to themselves and subcontractors contracted for that project in B2GNow. Only then can EDDC report the S/M/WBE goal attainment for the project. It should be noted that the thirteen projects reviewed by RSM US, LLP are still in the construction phase and, thereby, being monitored for progression toward S/M/WBE commitment participation. Below are the numerous factors impacting project participation and goal attainment percentages:</p> <ul style="list-style-type: none"> <li>• Unforeseen conditions</li> <li>• Scope changes</li> <li>• Terminations for cause/convenience</li> <li>• The frame in each respective sub is engaged</li> <li>• Subcontractor replacement/substitution</li> <li>• Irregular invoice submittals to the District</li> <li>• Invoice approval process requirements &amp;/or delays</li> <li>• Prompt payment to primes</li> <li>• Prompt payment to subs by primes</li> <li>• Direct Order Purchase Reconciliation</li> <li>• Change Orders</li> <li>• Retainage Release</li> </ul> <p style="text-align: right;"><i>(continued on next page)</i></p>



OBSERVATIONS (CONTINUED)

“BIG 3” PROJECT ANALYSIS	
OBSERVATION	4. S/M/WBE Compliance and Monitoring (Continued)
MANAGEMENT’S RESPONSE	<p><b>EDDC Response (continued):</b> Therefore, any determination of contractual S/M/WBE participation attainment can only be conclusive once the final retainage has been paid to the prime contractor and confirmed payments from the subcontractors on the project.</p> <p>Despite the meticulous monitoring process, certain factors and challenges have hindered EDDC's real-time monitoring of goal attainment, primarily due to the need for real-time connectivity. This limitation has prompted EDDC to seek SBBC approval to enhance system functionalities. The proposed enhancements aim to seamlessly integrate with SAP Ariba, E-Builder, and financial systems, thereby reducing the manual process and improving the efficiency of the monitoring process.</p>



## OBSERVATIONS (CONTINUED)

### “BIG 3” PROJECT ANALYSIS

#### OBSERVATION 5. Contractual Construction Schedules

**DETAIL** RSM previously reported a finding related to construction manager compliance with contractual construction schedules in the September 2022 *Program Management Internal Audit Report* (Observation #4), which remains open as of the date of this report. Through our review of the contract documents for the SMART Program Renovations projects for the “Big 3” schools, we noted that all three (3) projects have surpassed their contractual substantial completion date. While change orders to extend the construction duration were issued for Northeast High School (P.001684) and Blanche Ely High School (P.001646), each project has surpassed the modified substantial completion date.

The table below illustrates the number of days in which each project has surpassed the contractual substantial completion (“SC”) date, as of February 29, 2024.

School / Project Name	Contractual SC Date (per NTP)	Days Extended by Executed Change Orders	Revised Contractual SC Date	Actual SC Date (if applicable)	Days Passed Contractual SC Date
Stranahan HS – GOB Renovations (P.001683)	1/15/2021	0	1/15/2021	N/A	1,140 <sup>1</sup>
Northeast HS – GOB Renovations (P.001684)	11/6/2022	285	8/18/2023	N/A	195
Blanche Ely HS – GOB Renovations (P.001646)	8/1/2020	148	12/27/2020	N/A	1,159

*Note 1 SBBC approved the PM/OR’s recommendation to terminate (without cause) the CMAR Agreement with Gilbane Building on August 8, 2023. Remaining scope items to be completed through a separate carve-out project (P.001683-RC1).*

According to Article 4 of the District’s Construction Services Agreement, the Contractor is required to accomplish substantial completion on or before the date stipulated in the Notice to Proceed (“NTP”). A change order may be executed to modify the construction duration, per Article 27.6 of the Agreement. Failure to consistently adhere to contractual construction schedules may indicate potential inefficiencies or challenges in program-wide project execution, and may result in increased project costs, reputational damage, and disruption to educational services.

**RECOMMENDATION** In conjunction with the recommendations provided in RSM’s November 2023 *Program Management Internal Audit Report* (Prior Observation #5), the District may consider performing a program-wide analysis to identify projects that have surpassed their contractual completion date, or are trending beyond their contractual schedule to evaluate and assign responsibility for potential schedule delays. For contractor-driven delays, the District may choose to enforce the terms of their agreements, and pursue liquidated damages for each day of unexcused delay in achieving substantial or final completion.

(continued on next page)



OBSERVATIONS (CONTINUED)

“BIG 3” PROJECT ANALYSIS	
OBSERVATION	5. Contractual Construction Schedules (Continued)
RECOMMENDATION	If projects have surpassed their contractual completion date, or are at risk of schedule delays, change orders should be executed to modify the contractual completion dates to reflect a more reasonable project timeline. By executing a formal change order, the District is establishing revised expectations with the Contractor. Proactive measures such as early identification of potential delays and timely resolution of issues through effective change order management should be prioritized to mitigate future schedule deviations.
MANAGEMENT’S RESPONSE	<b>PM/OR Response:</b> The PMOR prepares a construction contractual schedule report that outlines the contractual schedule and any variances. The District and the PMOR team regularly review projects for the assessment of Liquidated Damages. Prior standard operating procedure (SOP) was to hold submission of change orders for time until the end of the project when all time elements could be reviewed and responsibility assigned at one time. The current SOP is to regularly review change orders for time, make responsibility determination of delay and issue change order per occurrence.





## OBSERVATIONS (CONTINUED)

### “BIG 3” PROJECT ANALYSIS

OBSERVATION	6. Non-Destructive/Destructive Testing Reports
DETAIL	<p>For each of the “Big 3” projects, we noted that third-party non-destructive/destructive testing reports were not readily available or retained in the District’s construction management software and system of record, e-Builder. While testing reports were provided upon further request by the PM/OR for Stranahan High School (P.001683) and Blanche Ely High School (P.001646), reports were not provided for Northeast High School (P.001684), as of the date of this report.</p> <p>For Northeast High School Project No. P.001684, we reviewed the Professional Services Agreement, and noted that an allowance of \$40,000 for non-destructive/destructive testing was included as part of the original agreement. In addition, Amendment #2 to the Professional Services Agreement increased allowances by \$16,500 for additional pre-design testing for destructive/non-destructive testing, and to perform test and balance of the HVAC system.</p> <p>If key documents are not obtained and stored promptly, there is a risk that they may be misplaced or lost. By adhering to documentation retention processes, the District is able to confirm that all contractual obligations are fulfilled by third parties.</p>
RECOMMENDATION	We recommend the PM/OR continue to follow up with relevant parties to obtain the requested reports for Northeast High School (P.001684) and verify that non-destructive/destructive testing was performed. Further, the District may consider developing procedures to verify that all third-party testing reports are received and uploaded to e-Builder in a timely manner.
MANAGEMENT’S RESPONSE	<b>PM/OR Response:</b> The PMOR has tasked the Design Manager to validate that the non-destructive/destructive testing is uploaded in e-Builder for all of the active projects.



## **APPENDIX A – STRANAHAN HIGH SCHOOL**

### ***PROJECT PERFORMANCE REPORTS & BOARD ACTION TIMELINES***

Appendix A1

Project Performance Report

(as of November 2023)

Stranahan High School

Project Name	Stranahan High School	Financial Summary			
Project Number	P.001683	Original Budget	Current Budget	Current Commitments	Actuals Approved
Project Name	SMART GOB Renovations				
Delivery Method	RFQ - CMAR	\$15,442,577	\$28,296,234	\$28,026,495	\$22,643,005
Project Phase	Construction	Drivers of Budget Change <sup>2</sup>			
Project Consultant	Wolfberg Alvarez and Partners, Inc.	Design	39% ↑	Construction	77% ↑
Contractor	Gilbane Building Company, Inc.	Program Mgmt.		143% ↑	
Project Scope (per SMART “School Spotlight”)		Budget for basic fees for professional services increased by 41%, primarily due to four (4) additive PSA amendments, which increased the total contract amount from \$997,050 to \$1,326,759.		GMP #2 (\$24,700,251) significantly exceeded available funding at the time of execution, resulting in a total budget increase of \$13,710,000 on 4/24/18. As of November 2023, the “Bldg Improv & Contract” budget increased by 83%.	
Roofing Replacement for Buildings 1, 2, 3, 4, 8, 9, 10, 11, 13, 14, 17,18, 20, 21, and 22. Air Handler Replacements in Buildings 1, 2, 4, 5, 6, 7, 9, 10, 13, 14, 17, and 21. Fire Alarm Complete Replacement of Campus. Electrical Improvements to the main Switch Doghouses on-site. Media Center (MC) and STEM lab improvements in Buildings 4, 6, 20, and 23. Fire Sprinkler additions to Buildings 1, 2, and 9.		The current budget for “direct purchases” exceeded the original budget by \$2,680,016.			
Cost Breakdown by Category (\$) <sup>1</sup>		Construction Change Order Breakdown			
		Construction Changes		Change Order Categories by Cost (%)	
\$1,479,447	Cost for professional services (design)	2 Total change orders		<div><div>86% Consultant Omission</div><div>14% Owner Request</div><div>0% Unforeseen Condition</div></div>	
\$16,377,548	Cost for construction services	4 Total change items			
		0 Days extended			
\$4,786,011	Program management fees and other miscellaneous construction costs (i.e., PM fees, labor allocations, equipment purchases, etc.)	\$292.7K Net change			

<sup>1</sup> Based on actuals approved    <sup>2</sup> Compares the "2014 Original Budget to the "Current Budget" (see "Financial Summary on following page for detail)

# Appendix A1

## Financial Summary

(as of November 2023)

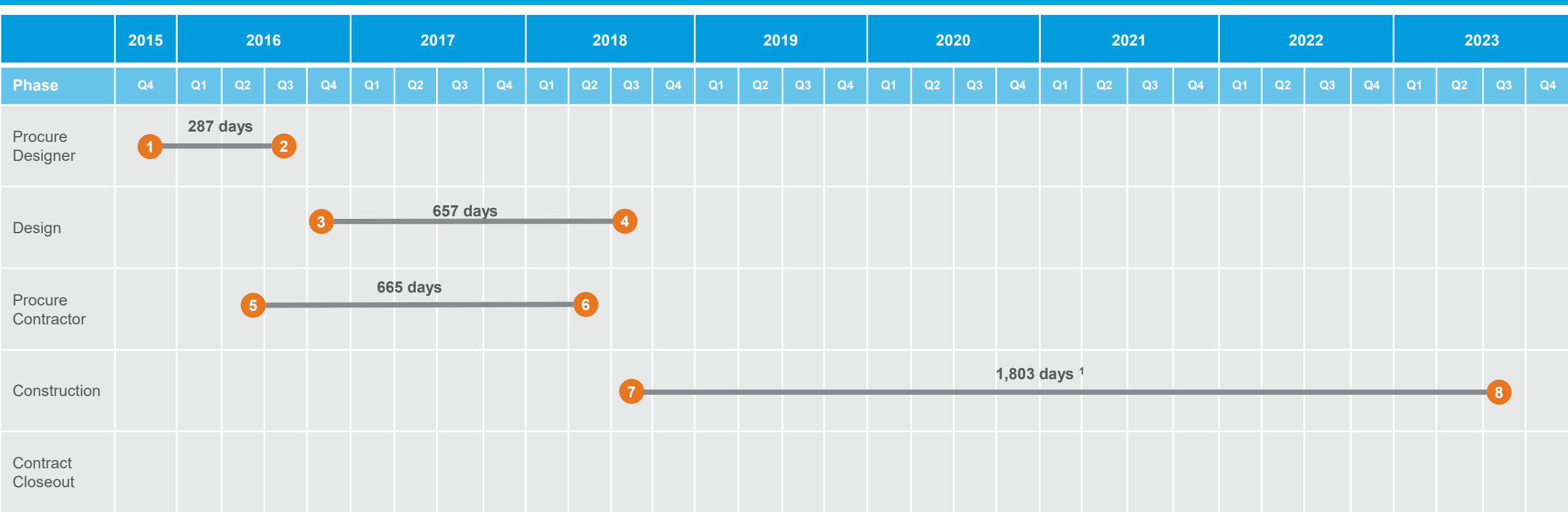
Stranahan High School

Financial Summary						
Budget Description	RSM Category	2014 Original Budget	Current Budget	Current Commitments	Actuals Approved	Current Budget vs. Original Budget
Basic Fees	Design	981,367.00	1,379,517.00	1,412,728.97	1,370,892.59	398,150.00
Supplementary Services	Design	65,550.00	70,550.00	52,780.03	50,950.23	5,000.00
Misc. Consultants	Design	41,000.00	58,000.00	57,922.33	57,604.08	17,000.00
<b>Subtotal</b>		<b>1,087,917.00</b>	<b>1,508,067.00</b>	<b>1,523,431.33</b>	<b>1,479,446.90</b>	<b>420,150.00</b>
Construction Mgmt Fees	Program Management / Other	1,314,066.00	1,665,061.00	1,573,400.01	1,573,400.01	350,995.00
Construction Mgmt Fees	Program Management / Other	138,750.00	-	-	-	(138,750.00)
IOTB, Long Term	Program Management / Other	-	15,507.61	15,507.61	15,507.61	15,507.61
Utility Connections	Program Management / Other	23,088.00	7,518.88	7,518.88	-	(15,569.12)
Basic Admin FFE	Program Management / Other	-	14,098.95	14,076.33	14,076.33	14,098.95
Basic Classroom FFE	Program Management / Other	-	188,802.05	188,472.43	186,072.43	188,802.05
Comm Infrastructure	Program Management / Other	-	48,574.00	44,293.81	43,138.81	48,574.00
Media Center	Program Management / Other	-	117,258.00	117,257.83	117,257.83	117,258.00
Technical Equipment	Program Management / Other	-	16,438.98	15,279.62	15,279.62	16,438.98
Legal Fees	Program Management / Other	100,000.00	-	-	-	(100,000.00)
Direct Purchase	Program Management / Other	-	2,680,016.29	2,651,587.58	2,649,041.42	2,680,016.29
Misc. Construction	Program Management / Other	453,500.00	172,449.30	172,449.30	172,236.84	(281,050.70)
<b>Subtotal</b>		<b>2,029,404.00</b>	<b>4,925,725.06</b>	<b>4,799,843.40</b>	<b>4,786,010.90</b>	<b>2,896,321.06</b>
Bldg Improv & Contract	Construction	11,744,101.00	21,548,957.31	21,703,219.97	16,377,547.59	9,804,856.31
Construction Contingency	Construction	581,155.00	-	-	-	(581,155.00)
Program Contingency	Construction	-	313,484.63	-	-	313,484.63
<b>Subtotal</b>		<b>12,325,256.00</b>	<b>21,862,441.94</b>	<b>21,703,219.97</b>	<b>16,377,547.59</b>	<b>9,537,185.94</b>
<b>Total</b>		<b>15,442,577.00</b>	<b>28,296,234.00</b>	<b>28,026,494.70</b>	<b>22,643,005.39</b>	<b>12,853,657.00</b>

Project Milestones: Actuals

(as of November 2023)

Stranahan High School



<sup>1</sup> On August 8, 2023, the Board approved to terminate, without cause, the CMAR Agreement with Gilbane Building Company. The remaining scope was "carved out" as a separate project (P.001683-RC1), and transitioned to Atlas Apex Roofing, LLC as a Construction Services Minor Project ("CSMP").

Milestones

- 1

Board approve to advertise (11/03/15)
- 2

Board award date (08/16/16)
- 3

ATP date (10/20/16)
- 4

LOR permit date (08/08/18)
- 5

Board approve to advertise (06/28/16)
- 6

Board approve CMAR GMP #2 (04/24/18)
- 7

Issue NTP to Contractor (08/31/18)
- 8

Board approve to terminate contract (08/08/23)

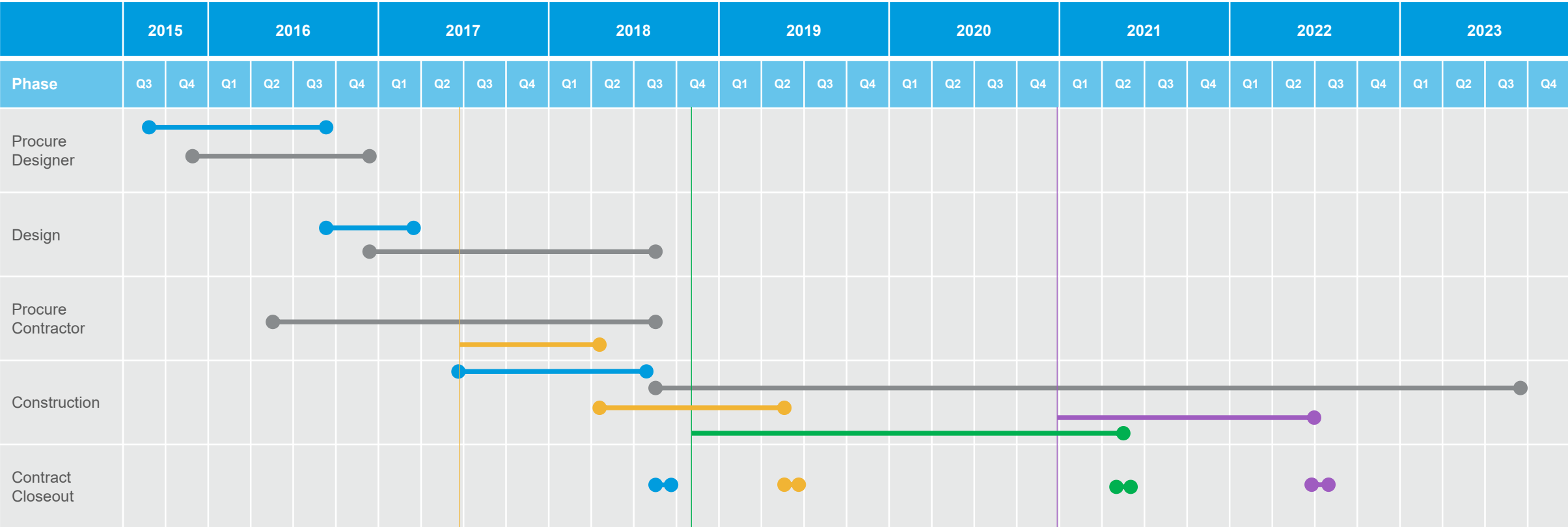


Appendix A1

Project Milestones: Schedule Comparison

Stranahan High School

(as of November 2023)



- BOC Schedule (August 2016)
- Heery Baseline Schedule (June 2017)
- Heery Rebaseline Schedule (October 2018)
- AECOM Rebaseline Schedule (December 2020)
- Actual Schedule

Heery Baseline Heery Rebaseline AECOM Rebaseline

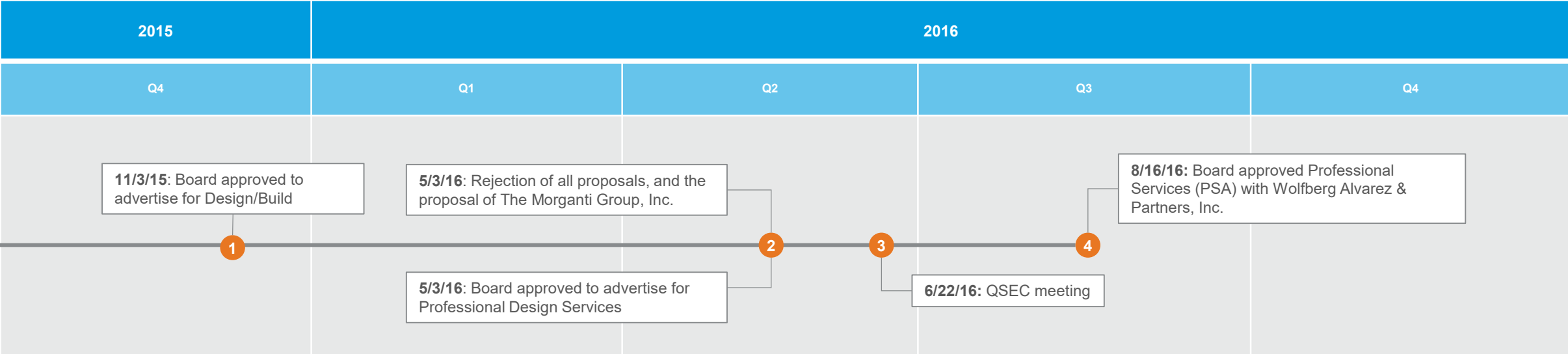


Appendix A1

Project Phase: Procure Designer (Actuals)

Stranahan High School

Phase Duration: 11/3/2015 – 8/16/2016  
Total Duration: 287 days



Milestones

- 1 Authorization to advertise for Design/Build Services (11/03/2015)
- 2 Rejection of all proposals for RFP 16-071F, and reject the proposal of The Morganti Group, Inc. as non-responsive; Board approved to advertise for Professional Design Services (05/03/2016)
- 3 QSEC meeting to discuss recommendations (06/22/2016)
- 4 Board approved Professional Services Agreement with Wolfberg Alvarez & Partners, Inc. (“Wolfberg Alvarez”, “PSA”) in the amount of \$997,050 (08/16/2016)

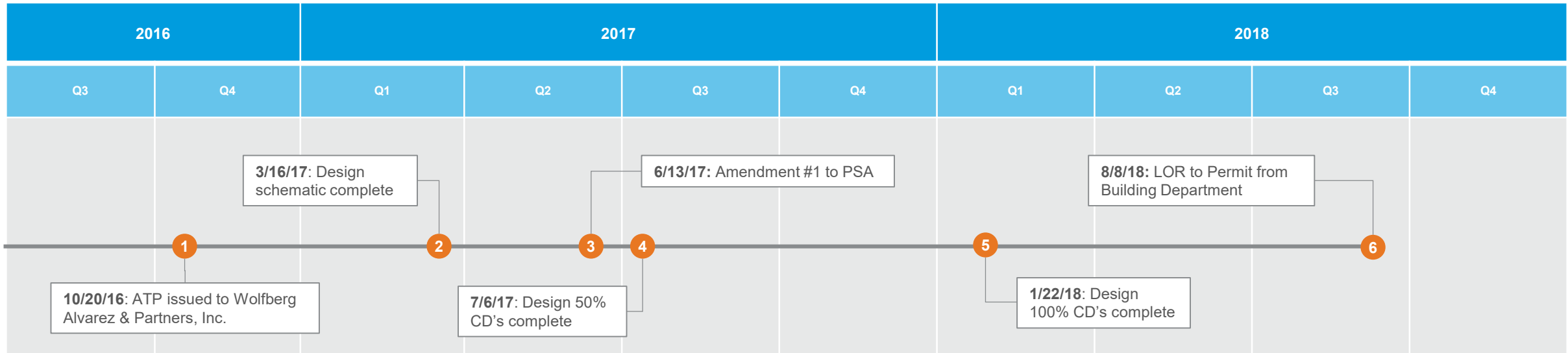


# Appendix A1

## Project Phase: Design (Actuals)

# Stranahan High School

Phase Duration: 10/20/2016 – 8/8/2018  
Total Duration: 657 days



## Milestones

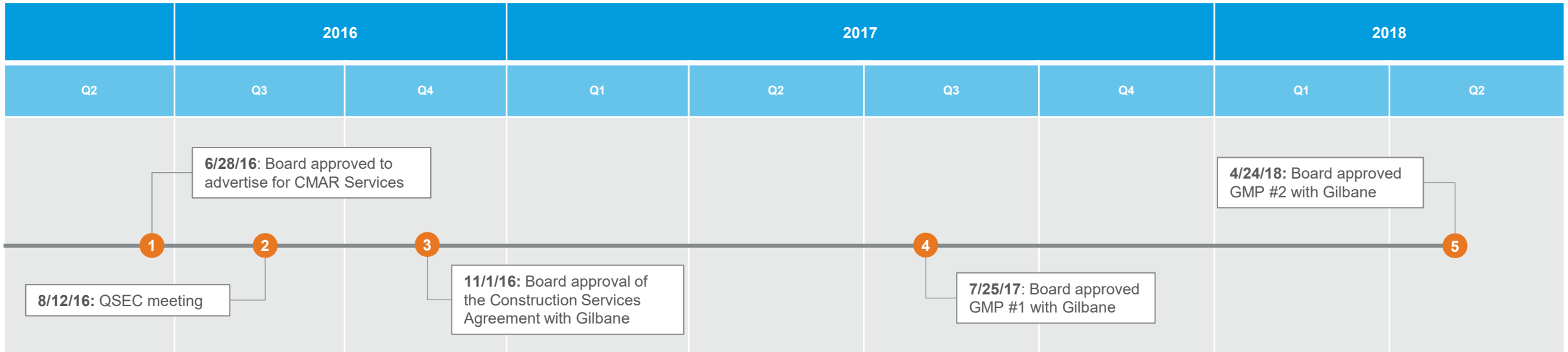
- 1 Authorization to Proceed issued (10/20/2016)
  - 2 Design schematic review complete (03/16/2017)
  - 3 First Amendment to PSA with Wolfberg/Alvarez & Partners, Inc. in the amount of \$49,867 (06/13/2017)  
*Basic fees increased by \$34,867 and the allowance for reproduction expenses increased in the amount of \$15,000.*
  - 4 Design 50% Construction Documents complete (07/06/2017)
  - 5 Design 100% Construction Documents complete (01/22/2018)
  - 6 Letter of Recommendation to Permit from SBBC Building Department (08/08/2018)



# Appendix A1

## Project Phase: Construction Procurement (Actuals) Stranahan High School

Phase Duration: 6/28/2016 – 4/24/2018  
Total Duration: 665 days



## Milestones

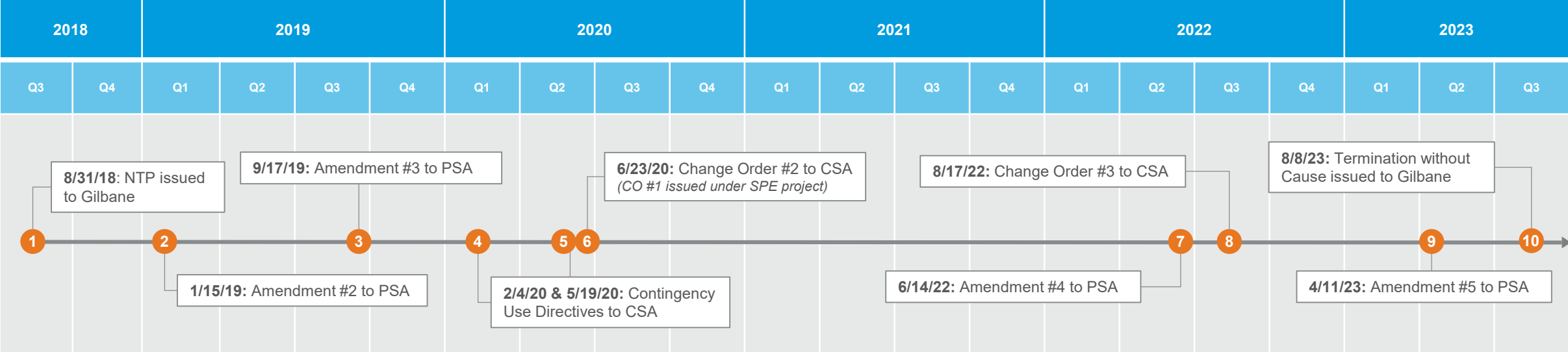
- 1 Authorization to advertise for Construction Manager at Risk Services (06/28/2016)
- 2 QSEC meeting to discuss recommendations (08/12/2016)
- 3 Construction Services Agreement with Gilbane Building Company, Inc. ("Gilbane", "CSA") in the amount of \$138,750 for the pre-construction phase (11/01/2016)
- 4 Board approved GMP #1 Amendment with Gilbane Building Company, Inc. in the amount of \$420,143 (07/25/2017)  
*GMP to establish the scope for Single Point of Entry (SPE). This project was prioritized prior to the remainder of the SMART renovation projects.*
- 5 Board approved GMP #2 Amendment for Gilbane Building Company, Inc. in the amount of \$24,280,108 for the remainder of the SMART scope items (04/24/2018)

Appendix A1

Project Phase: Construction (Actuals)

Stranahan High School

Phase Duration: 8/31/2018 – 8/8/23  
Total Duration: 1,803 days (through Gilbane contract termination)



Milestones

- 1

Notice to Proceed was issued to Gilbane Building Company, Inc., with a required Substantial Completion no later than 868 consecutive calendar days (08/31/2018)
- 2

Second Amendment to PSA with Wolfberg Alvarez & Partners, Inc. in the amount of \$37,251 (01/15/2019)  
*Consultant to provide a "pull-out" design package for building 16 to be constructed in conjunction with the pool renovations project and provide services of off-site improvements for the fire sprinkler scope, bringing the basic fees up to a total of \$32,251. Additionally, an increase in the allowance for reproduction expenses in the amount of \$5,000.*
- 3

Third Amendment to PSA with Wolfberg Alvarez & Partners, Inc. in the amount of \$227,149 (09/17/2019)  
*Increase to the Basic Services Fees associated with roofing and drainage scope and an extended Construction Administration phase for the SMART Program Renovations.*
- 4

Decrease in contingency funds in the amount of \$83,913 and reallocate funds to the cost of work due to unforeseen conditions, but no impact to project budget (02/04/2020)
- 5

Decrease in contingency funds in the amount of \$73,499 and reallocate funds to the cost of work due to unforeseen conditions, but no impact to project budget (05/19/2020)
- 6

Change Order #2 for Gilbane Building Company, Inc. in the amount of \$267,001, but no impact to project budget (06/23/2020)  
*Installation of supplemental outside air supply fans and associated electrical service, controls and fire alarm system interface for all air units; new scope was not included in needs assessment nor SOW established by the MAPPs report, but additional materials, equipment, and labor required to install underground storm drainage systems to collect rainwater run-off from existing roof areas; transformer that was not initially part of the MAPPs analysis had to be replaced due to its poor condition.*

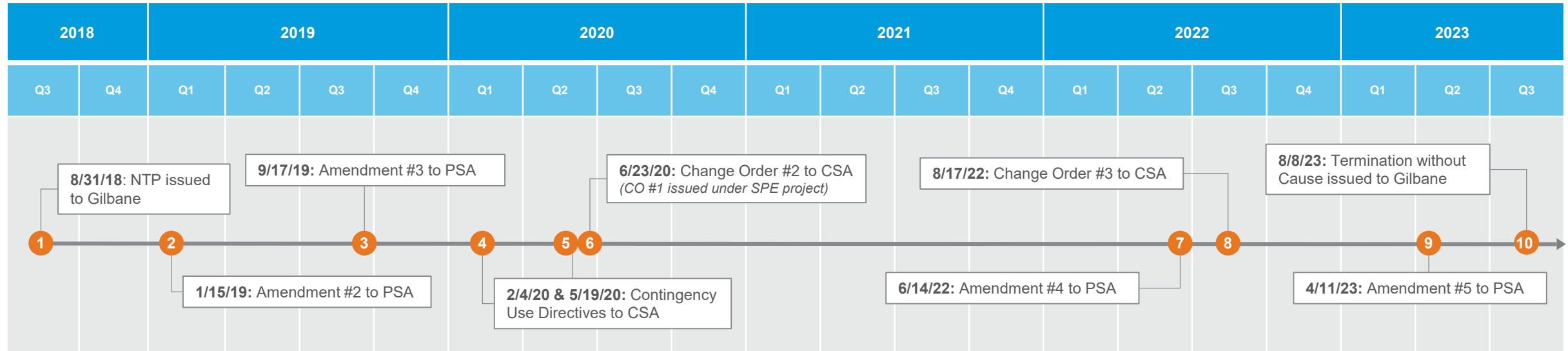


# Appendix A1

## Project Phase: Construction (Actuals) (Continued)

# Stranahan High School

Phase Duration: 8/31/2018 – 8/8/23  
Total Duration: 1,803 days (through Gilbane contract termination)



### Milestones (Continued)

- |   |  |
|---|--|
| <p><b>7</b> Fourth Amendment to Form 01250g with the PSA with Wolfberg Alvarez &amp; Partners, Inc., but no impact to project budget (06/14/2022)</p> <p><i>Amendment to modify the COI to document whether they concur with the “category” of each proposed change. The category of each COI is established exclusively by the Owner to identify the reason for the change. Categories include Owner’s Request, Unforeseen, Consultant Error or Consultant Omission. All Project Consultants have agreed to this change.</i></p> | <p><b>9</b> Fifth Amendment to PSA with Wolfberg Alvarez &amp; Partners, Inc. in the amount of \$15,411 (04/11/2023)</p> <p><i>Increase to the basic fees by \$34,552 due to the discovery of termite damage on Building 18 roof, revision of contract documents to include the demolition and relocation of the existing kiln room in building 6 to an existing storage room within the same building, and to prepare a CASTALDI report to compare the cost efficiency of demolishing and replacing the existing building 17 as opposed to performing building envelope improvements and other modifications.</i></p> |
| <p><b>8</b> Change Order #3 for Gilbane Building Company, Inc. in the amount of \$25,725, but no impact to project budget (08/17/2022)</p> <p><i>Wrap the roofing up the walls in lieu of stucco installation which could compromise existing roofing installation.</i></p>   | <p><b>10</b> Termination without Cause issued to Gilbane Building Company, Inc., due to the Contractor’s lack of presence on site (08/08/2023)</p> <p><i>The remaining roofing work will be continued with Atlas Apex Roofing Inc., once the District has funds to complete the project.</i></p>   |

## Appendix A2 - Board Actions Timeline Stranahan High School

Regular School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
11/3/2015	GOB Renovations	P.001683	J-4	9-0	Yes	Yes	The purpose of the Authorization to Advertise for Design/Build Services for GOB Renovations, Project No. P.001683, and approve the RFP Form, and approve the Design/Build Standard Agreement Form, RFP 16-071F.	\$ -	0
5/3/2016	GOB Renovations	P.001683	J-8	8-0	Yes	Yes	The purpose is the rejection of all proposals for RFP 16-071F, and reject the proposal of The Morganti Group, Inc. ("Morganti") as non-responsive. In final review and preparation of the agenda items to award the three (3) RFPs to the Morganti Group, a document was discovered that qualified Morganti proposals to limit the project scope following design to align to their Costs of Service. This information was immediately reviewed with the General Counsel's Office to seek legal advice as to the process moving forward. It was recommended that the PMOR (Heery) contact Morganti for clarification. This effort affirmed their proposals to be non-responsive because they included impermissible qualification to the Costs of Service proposal.	\$ -	0
5/3/2016	GOB Renovations	P.001683	J-11	7-0	Yes	Yes	The purpose is authorization to advertise RFQ 16-167C, Professional Design Services for Stranahan Senior High School; approve the RFQ Form; and authorize the Professional Services Agreement (PSA) Form. This project has been appropriated in the Adopted District Educational Facilities Plan (September 8, 2015) and in the District's Capital Budget. Total funds allocated for the scope included is \$16,847,000 and includes soft costs. Financial obligations will take place at a future Board meeting when approval is requested to award Professional Design Services.	\$ 16,847,000.00	0
8/16/2016	GOB Renovations	P.001683	JJ-4	8-0	Yes	Yes	The purpose of the Professional Services Agreement (Construction Management At Risk Project Delivery) with Wolfberg Alvarez & Partners, Inc., SMART Program Renovations, Project No. P.001683. The Financial impact of the Professional Services Agreement includes \$946,500 for Basic Services and \$50,550 for Supplemental/Reimbursable Fees, totaling \$997,050.	\$ 997,050.00	0
8/16/2016	GOB Renovations	P.001683	JJ-7	8-0	No	Received	Receive additional information regarding the Construction Manager at Risk Services (CMAR) request to advertise for Blanche Ely Senior High, Northeast Senior High School, and Stranahan Senior High School. Board approval to issue Request for Qualification (RFQ) for CMAR occurred at the Special School Board meeting on June 28, 2016. During the Board's deliberation, there was consideration to deter the items to a later date in order to provide an opportunity for the District's Audit Committee to provide feedback and an opportunity for select Board members not in attendance to ask questions and feedback.	\$ -	0
11/1/2016	GOB Renovations	P.001683	JJ-4	8-0	No	Yes	The purpose of approving the recommendation for award of the Construction Services Agreement RFQ 16-206C; Lump Sum Pre-Construction Fee Award Amount: \$138,750; Vendor Awarded: Gilbane Building Company. This Project has been appropriated in the Adopted District Educational Facilities Plan, Fiscal Years 2016-17, Page 212, amount of \$16,847,000.	\$ 138,750.00	0
7/25/2017	Single Point of Entry	P.001683-SPE	JJ-3	7-0	Yes	Yes	The purpose of the GMP Amendment to the Construction Services Agreement dated November 1, 2016 with Gilbane Building Company, Project No. P.001683 is to establish the Guaranteed Maximum Price (GMP) in the amount of \$420,143 for the Single Point of Entry (SPE) improvements. Approval of this GMP Amendment will allow a Notice to Proceed (NTP) to be issued to the contractor.	\$ 420,143.00	0
4/10/2018	Cafeteria Additions / Renovations	P.002163	J-3	N/A	N/A	Yes	The purpose of approving the Authorization to Advertise RFQ 18-172C for Design Professional Services (CMAR Delivery) - Stranahan High School, Cafeteria Addition and Renovations, Project No. P.002163, Approve the RFQ Form, and Authorize the Professional Services Agreement (PSA) Form.	\$ -	0
4/24/2018	GOB Renovations	P.001683	JJ-7	8-0	Yes	Yes	The purpose of the Second GMP Amendment to the Construction Services Agreement with Gilbane Building Company, Project No. P.001683 is to approve the use of CDI/Subguard and approve additional funding in the amount of \$13,710,000. The financial impact of approving this Second GMP Amendment is \$24,280,108. There is an additional impact to the project budget.	\$ 24,280,108.00	0
6/26/2018	Cafeteria Additions / Renovations	P.002163	J-6	N/A	No	Yes	The purpose of the Authorization to Advertise Construction Management at Risk Services for Cafeteria Addition/Renovations is to approve the RFQ Form and authorize the Construction Management at Risk (CMAR) Agreement, and RFQ 19-062C. Total funding allocated for the scope is \$6,675,000 and includes soft costs.	\$ 6,675,000.00	0
7/24/2018	Cafeteria Additions / Renovations	P.002163	JJ-3	9-0	No	Yes	The purpose of approving the Professional Services Agreement (Construction Management at Risk Project Delivery) with LIVS Associates, LLC for the total amount of \$543,000 is for the New Cafeteria Addition/Renovations, Project No. P.002163, RFQ 18-172C.	\$ 543,000.00	0

## Appendix A2 - Board Actions Timeline Stranahan High School

Regular School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
8/21/2018	Single Point of Entry	P.001683-SPE	JJ-2	7-0	No	Yes	The purpose is approving the GMP 1 Final Change Order/Final Acceptance/Final Retainage Release, Gilbane Building Company, Single Point of Entry, Project No. P.001683, for a credit in the amount of \$39,740 and no change in contract time.	\$ (39,840.00)	0
1/15/2019	GOB Renovations	P.001683	JJ-1	9-0	No	Yes	The purpose of the Second Amendment to the Professional Services Agreement with Wolfberg/Alvarez and Partners, Inc. is for Project No. P.001683, SMART Program Renovations, RFQ 16-167C, in the amount of \$37,251. This Second Amendment to the agreement will result in a net increase to the Basic Fees, and includes an increase associated with the permitting of off-site improvements related to the fire sprinkler scope; increased to provide a separate "pull-out" package for Building 16 (pump house); and increase to cover the rise in reproduction expenses.	\$ 37,251.00	0
4/23/2019	GOB Renovations	P.001683	J-1	5-0	Yes	Yes	The purpose is to approve the First Amendment to Construction Service Agreements Versions 1-3, Multiple Construction Managers for Construction Management at Risk (CMAR) Services, Multiple Projects, SMART Program Renovations. The purpose of the Amendment to these Construction Services Agreements is to insert language that requires Construction Management Firms to use e-Builder to manage their project(s). e-Builder is the District's (BCPS) adopted software platform for managing projects in the SMART Program. These Agreements were executed prior to having e-Builder language requirements included in them.	\$ -	0
9/17/2019	GOB Renovations	P.001683	JJ-8	8-0	No	Yes	The purpose of this Third Amendment to the Professional Services Agreement with Wolfberg Alvarez and Partners, Inc. for Project No. P.001683, SMART Program Renovations, RFQ 16-167C, in the amount of \$227,149 is for an increase to the Basic Services Fees associated with roofing scope, roof drainage scope, and an extended Construction Administration phase for the SMART Program Renovations at Stranahan High School.	\$ 227,149.00	0
5/19/2020	GOB Renovations	P.001683	JJ-25	8-0	No	Yes	The purpose is a decrease in the Contingency funds in the amount of \$73,499 and reallocating those funds to the cost of work due to unforeseen conditions, as provided for in the agreement between The School Board of Broward County, Florida and the Construction Manager at Risk (CMAR), Gilbane Building Company.	\$ -	0
6/23/2020	GOB Renovations	P.001683	JJ-8	9-0	No	Yes	The purpose of approving Change Order #2, Gilbane Building Company, SMART Program Renovations for Project No. P.001683, in the amount of \$267,001 and no change in contract duration. This project has been appropriated in the Adopted District Educational Facilities Plan. There is no impact to the project budget.	\$ 267,001.00	0
5/18/2021	Cafeteria Additions / Renovations	P.002163	JJ-32	4-5	Yes	No	The purpose of approving this Second Amendment to the Professional Services Agreement with LIVS Associates, LLC., dated May 18, 2021, for the amount of \$115,500, Project No. P.002163, SMART Program Renovations, RFQ 18-172C. This Second Amendment to the agreement will result in a net increase to the Basic Fees, and includes the redesign of the 100% drawings; increase for unforeseen design elements; and increase in allowances for additional reproduction costs.	\$ 115,500.00	0
11/9/2021	Cafeteria Additions / Renovations	P.002163	JJ-28	7-1	Yes	Yes	The purpose of approving Option A (Prototype Option) to Deliver the Construction of a New Cafeteria. The Board had an in-depth discussion on this item that included, but was not limited to, choosing Option A (Prototype) or Option B (New Design) for the new cafeteria; if the prototype met State Requirements for Educational Facilities (SREF) standards; if the District would be required to be exempt from SREF; ensuring the new cafeteria would not be too small; why there was push-back on the recommended option; Option A would be much quicker to complete and less expensive.	\$ -	0
6/14/2022	GOB Renovations	P.001683	J-1	N/A	N/A	Yes	The purpose of the Fourth Amendment is to approve updates to the Form 02150g with the Professional Services Agreement with Wolfberg Alvarez and Partners, Inc. for Project No. P.001683, SMART Program Renovations, RFQ 16-167C. There is no impact to the project budget.	\$ -	0
8/17/2022	GOB Renovations	P.001683	JJ-8	8-0	Yes	Yes	The purpose of approving Change Order #3 is adding the amount of \$25,725 with no change to the contract duration - Gilbane Building Company, SMART Program Renovations, Project No. P.001683.	\$ 25,725.00	0

## Appendix A2 - Board Actions Timeline Stranahan High School

Regular School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
2/15/2023	Cafeteria Additions / Renovations	P.002163	J-9	9-0	Yes	Yes	The purpose of approving the grant of an FP&L Easement grant is for the new Cafeteria Addition to Stranahan High School (P.002163).	\$ -	0
4/11/2023	GOB Renovations	P.001683	JJ-10	8-0	No	Yes	The purpose of this Fifth Amendment to the Professional Services Agreement with Wolfberg/Alvarez & Partners, Inc., RFQ 16-167C, in the amount of \$15,411, is due to a request to provide an evaluation of the Building 18 roof following the discovery of termite damage; request to revise the permitted contract documents to include the demolition and relocation of the existing kiln room in Building 6 to an existing storage room in the same building; and request to prepare a CAST ALDI report to compare the cost efficiency of demolishing and replacing Building 17 as opposed to performing building envelope improvements.	\$ 15,411.00	0
8/8/2023	GOB Renovations	P.001683	JJ-4	9-0	Yes	Yes	Approve AECOM's recommendation through the Superintendent to the Board to terminate, without cause, the Construction Manager at Risk Agreement ("CMAR Agreement") between the School Board of Broward County, Florida (the "School Board") and Gilbane Building Company ("the Construction Manager" or "Gilbane") for the Stranahan High School, Project No. P.001683 (the "Project").	\$ -	0
Operational School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
6/13/2017	GOB Renovations	P.001683	JJ-3	N/A	No	Yes	The purpose of this First Amendment to the Professional Services Agreement with Wolfberg Alvarez and Partners, Inc. for Project No. P.001683, SMART Program Renovations, RFQ 16-167C, in the amount of \$49,867 is for an increase to the Basic Services Fees and allowances for non-destructive/destructive testing and providing a conceptual study for the cafeteria/kitchen for the SMART Program Renovations at Stranahan High School.	\$ 49,867.00	0
3/6/2018	Cafeteria Additions / Renovations	P.002163	JJ-11	6-0	Yes	Yes	The purpose of approving the Recommendation to Provide New Cafeteria Addition, Renovations, and Additional Funding in the amount of \$4,475,000 to provide a new cafeteria addition, renovations, and additional scope and funding will be included in the amended FY2017-2018 Adopted District Educational Facilities Plan.	\$ 4,475,000.00	0
11/7/2018	Cafeteria Additions / Renovations	P.002163	JJ-8	N/A	N/A	Yes	The purpose of approving the Construction Services Agreement with Thornton Construction Company, Inc. for the Lump Sum Pre-Construction Award Amount of \$58,085 and the Construction Manager's Fee of 5%.	\$ 58,085.00	0
2/4/2020	Cafeteria Additions / Renovations	P.002163	JJ-12	N/A	N/A	Yes	The purpose to approve the First Amendment to the Professional Services Agreement dated July 24, 2018 with LIVS Associates, LLC, Stranahan High School, Project No. P.002163, Cafeteria Addition/Renovations, RFQ 18-172C. This First Amendment to the agreement is to increase Basic Services Fees, Supplemental Services, and Allowances due to the changes necessitated as a result of unforeseen conditions that were not evident during the planning stages. These items include, but are not limited to, existing structural deficiencies such as joist attachment, concrete masonry unit reinforcing, concrete floor joist integrity, and electrical code deficiencies that require panel upgrades for the Cafeteria Addition/Renovations at Stranahan High School.	\$ 121,501.00	0
2/4/2020	GOB Renovations	P.001683	JJ-9	7-0	No	Yes	The purpose of approving the Contingency Use Directive in the amount of \$(83,913) and reallocating those funds to the cost of work, due to unforeseen conditions.	-	0

## Appendix A2 - Board Actions Timeline Stranahan High School

Special School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
6/28/2016	GOB Renovations	P.001683	7	5-0	Yes	Yes	The purpose is authorization to advertise RFQ 16-206C for Construction Manager at Risk Services for Stranahan High School; approve the RFQ Form; and approval of the CMAR Standard Agreement Form and General Conditions. This project has been appropriated in the Adopted District Educational Facilities Plan (September 8, 2015) and in the District's Capital Budget. Total funds allocated for the scope included is \$16,847,000 and includes soft costs.	\$ -	0
12/20/2022	Cafeteria Additions / Renovations	P.002163	JJ-1	N/A	N/A	Yes	The purpose to approve GMP Amendment 1 to the Construction Services Agreement (Construction Management at Risk) with Thornton Construction Company, Inc. dated December 20, 2022, in the amount of \$17,453,074, and approve additional funding of \$6,286,760 LLC, Stranahan High School, Project No. P.002163, Cafeteria Addition/Renovations, RFQ 19-062C, District 3.	\$ 6,286,760.00	0
School Board Workshop Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
2/13/2018	GOB Renovations	P.001683	N/A	N/A	Yes	N/A	Staff shared the recommended options for the Stranahan cafeteria to the Board. Option 1 included cafeteria renovation and addition. Option 1 would take approximately 23 months to complete and seven (7) months for the permitting and construction. An additional \$6.4 million would be required to complete the work in Option 1. Option 2 included a cafeteria replacement food court, new design, and location. The new cafeteria would have a total capacity of 800; 600 indoor seating, 200 outdoor seating, and an additional outdoor seating option. Option 2 would take approximately 33 months to complete that includes eight (8) months for design, nine (9) months for permitting and procurement, and 16 months for construction. Option 2 would require an additional \$10.81 million in funding to complete. Staff also provided the Board with the pros and cons of both options.	\$ -	0



## **APPENDIX B – BLANCHE ELY HIGH SCHOOL**

### ***PROJECT PERFORMANCE REPORTS & BOARD ACTION TIMELINE***



Appendix B1

Project Performance Report

(as of November 2023)

Blanche Ely High School

Project Name	Blanche Ely High School	Financial Summary			
Project Number	P.001646	Original Budget	Current Budget	Current Commitments	Actuals Approved
Project Name	SMART GOB Renovations	\$14,795,436	\$ 21,735,436	\$21,386,088	\$20,578,024
Delivery Method	RFQ – CMAR	Drivers of Budget Change <sup>2</sup>			
Project Phase	Construction	Design 15% ↑	Construction 42% ↑	Program Mgmt. 105% ↑	
Project Consultant	Wolfberg Alvarez and Partners, Inc.	Budget for basic fees for professional services increased by 32%, primarily due to three (3) PSA amendments, totaling \$210,432. This increase was offset by unused project contingency.		GMP #2 (\$17,992,000) exceeded available funding at the time of execution, resulting in a total budget increase of \$7,310,000 on 4/17/18. As of November 2023, the “Bldg Improv & Contract” budget increased by 42%.	
Contractor	The Morganti Group, Inc.	The current budget for “direct purchases” exceeded the original budget by \$1,550,723.			
Project Scope (per SMART “School Spotlight”)					
Re-Roofing Buildings 1, 2, 4, 10, 11, 17, 18, 20, and 21. HVAC Replacement in Buildings 1, 2, 13, 14, 15, and 17. Chilled piping replacement on the south half of the campus. Chiller Replacement in Building 4. Electrical Upgrades to support HVAC Replacement. ADA Improvements (ADA Lifts at Building 14, ADA Restrooms Building 14), Building 17 Entry Ramp New Concessions area in Building 14 for Basketball Games. New Outdoor Dining Area.					
Cost Breakdown by Category (\$) <sup>1</sup>		Construction Change Order Breakdown			
		Construction Changes	Change Order Categories by Cost (%)		
\$1,234,057	Cost for professional services (design)	6 Total change orders	<div><div></div><div>25% Consultant Omission</div></div> <div><div></div><div>61% Owner Request</div></div> <div><div></div><div>14% Consultant Error</div></div>		
\$15,860,272	Cost for construction services	7 Total change items			
	Program management fees and other miscellaneous construction costs (i.e., PM fees, labor allocations, equipment purchases, etc.)	148 Days extended			
\$3,483,695		\$ 161.1K Net change			

<sup>1</sup> Based on actuals approved    <sup>2</sup> Compares the “2014 Original Budget to the “Current Budget” (see “Financial Summary on following page for detail)



# Appendix B1

## Financial Summary

(as of November 2023)

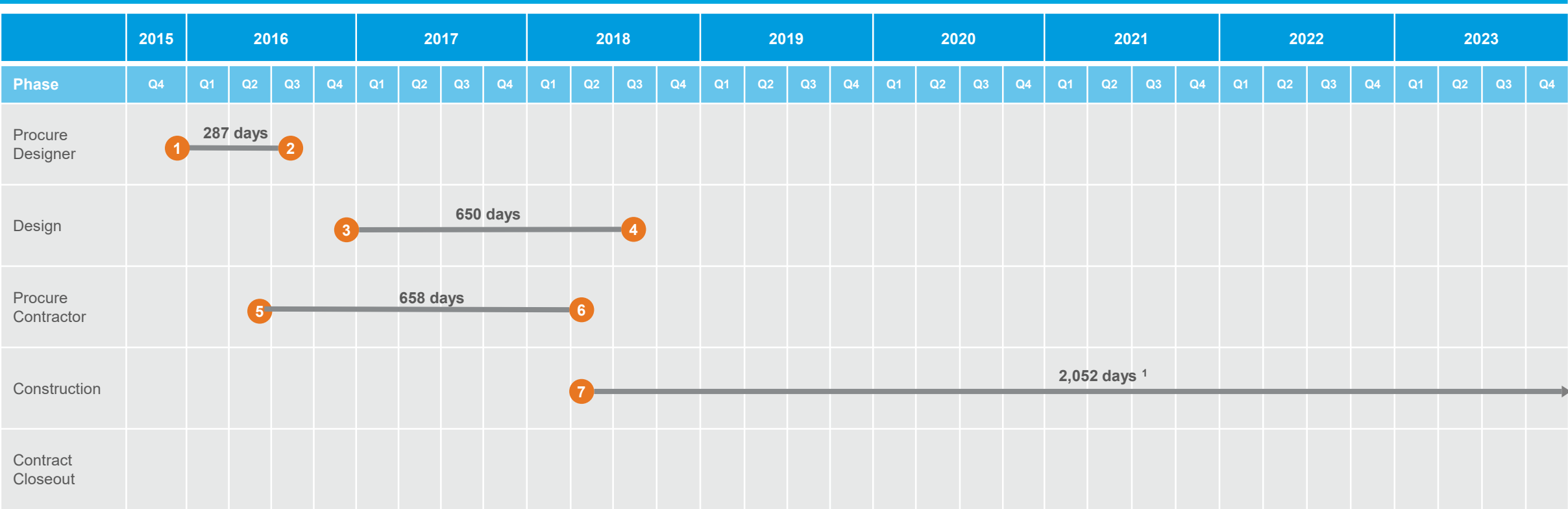
Blanche Ely High School

Financial Summary						
Budget Description	RSM Category	2014 Original Budget	Current Budget	Current Commitments	Actuals Approved	Current Budget vs. Original Budget
Basic Fees	Design	862,400.00	1,140,399.97	1,140,399.97	1,119,967.88	277,999.97
Supplementary Services	Design	72,432.00	79,932.03	79,932.03	34,758.98	7,500.03
Misc. Consultants	Design	89,000.00	79,338.12	79,338.12	79,330.12	(9,661.88)
Project Contingency	Design	110,000.00	-	-	-	(110,000.00)
<b>Subtotal</b>		<b>1,133,832.00</b>	<b>1,299,670.12</b>	<b>1,299,670.12</b>	<b>1,234,056.98</b>	<b>165,838.12</b>
Construction Mgmt. Fees	Program Management / Other	1,154,044.00	1,470,373.31	1,470,373.31	1,470,373.31	316,329.31
Construction Mgmt. Fees	Program Management / Other	98,000.00	-	-	-	(98,000.00)
Misc. Consultants	Program Management / Other	-	26,204.00	26,204.00	26,204.00	26,204.00
Comm Infrastructure	Program Management / Other	-	130,450.37	125,025.12	125,025.12	130,450.37
Utility Connections	Program Management / Other	26,960.00	-	-	-	(26,960.00)
Basic Admin FFE	Program Management / Other	-	59,344.86	59,344.86	59,344.86	59,344.86
Science	Program Management / Other	-	39,855.13	39,855.13	39,855.13	39,855.13
Basic Classroom FFE	Program Management / Other	-	9,812.58	9,812.58	9,812.58	9,812.58
Media Center	Program Management / Other	-	1,014.50	1,014.50	1,014.50	1,014.50
Technical Equipment	Program Management / Other	-	74,393.30	74,393.30	74,393.30	74,393.30
Direct Purchase	Program Management / Other	-	1,550,723.18	1,550,723.18	1,550,723.18	1,550,723.18
Misc. Construction	Program Management / Other	431,000.00	134,897.00	126,949.21	126,949.21	(296,103.00)
<b>Subtotal</b>		<b>1,710,004.00</b>	<b>3,497,068.23</b>	<b>3,483,695.19</b>	<b>3,483,695.19</b>	<b>1,787,064.23</b>
Bldg. Improv & Contract	Construction	11,400,095.00	16,602,723.02	16,602,722.82	15,860,271.94	5,202,628.02
Construction Contingency	Construction	551,505.00	335,974.63	-	-	(215,530.37)
<b>Subtotal</b>		<b>11,951,600.00</b>	<b>16,938,697.65</b>	<b>16,602,772.82</b>	<b>15,860,271.94</b>	<b>4,987,097.65</b>
<b>Total</b>		<b>14,795,436.00</b>	<b>21,735,436.00</b>	<b>21,386,088.13</b>	<b>20,578,024.14</b>	<b>6,940,000.00</b>

Project Milestones: Actuals

(as of November 2023)

Blanche Ely High School



<sup>1</sup> Construction ongoing, as of November 30, 2023.

Milestones

- 1

Board approve to advertise (11/03/15)
- 2

Board award date (08/16/16)
- 3

ATP date (11/03/16)
- 4

LOR permit date (08/15/18)
- 5

Board approve to advertise (06/28/16)
- 6

Board approve CMAR GMP #2 (04/17/18)
- 7

Issue NTP to Contractor (04/18/2018)
- 8

Substantial completion date<sup>1</sup> (TBD)
- 9

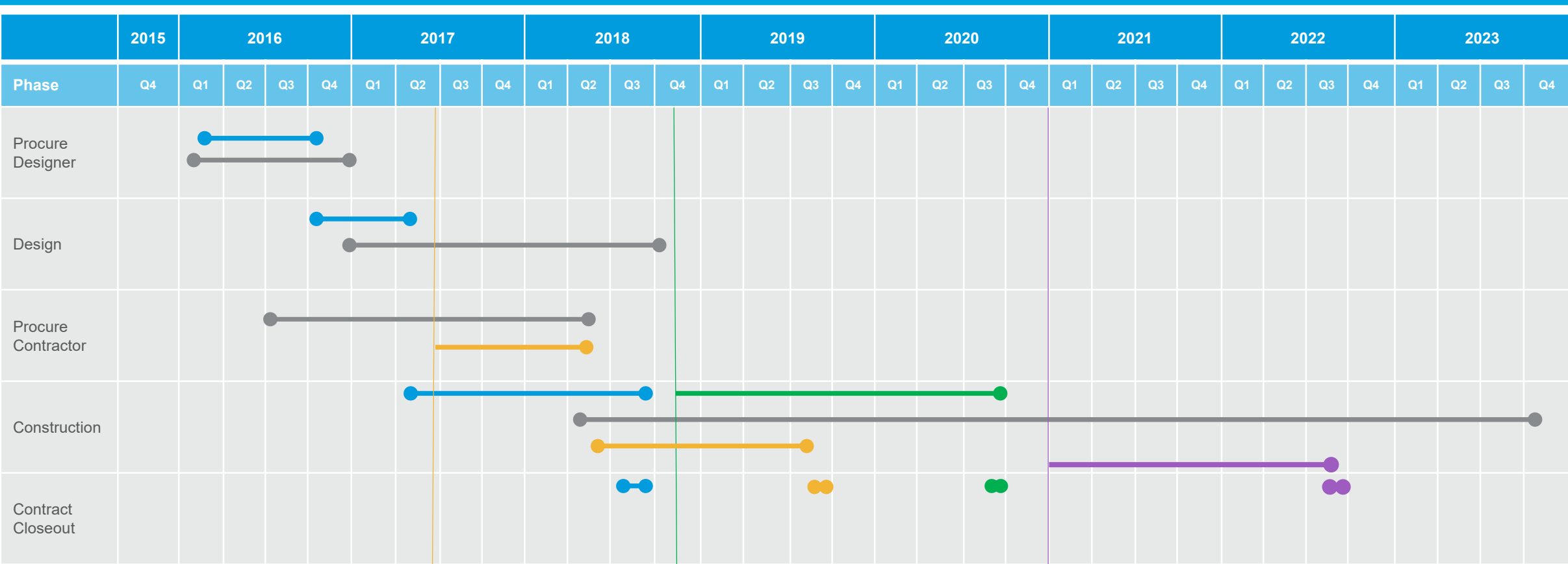
Contract close-out date (TBD)



Project Milestones: Schedule Comparison

Blanche Ely High School

(as of November 2023)



- — ● BOC Schedule (August 2016)
- — ● Heery Baseline Schedule (June 2017)
- — ● Heery Rebaseline Schedule (October 2018)
- — ● AECOM Rebaseline Schedule (December 2020)
- — ● Actual Schedule (e-Builder)

Heery Baseline

Heery Rebaseline

AECOM Rebaseline

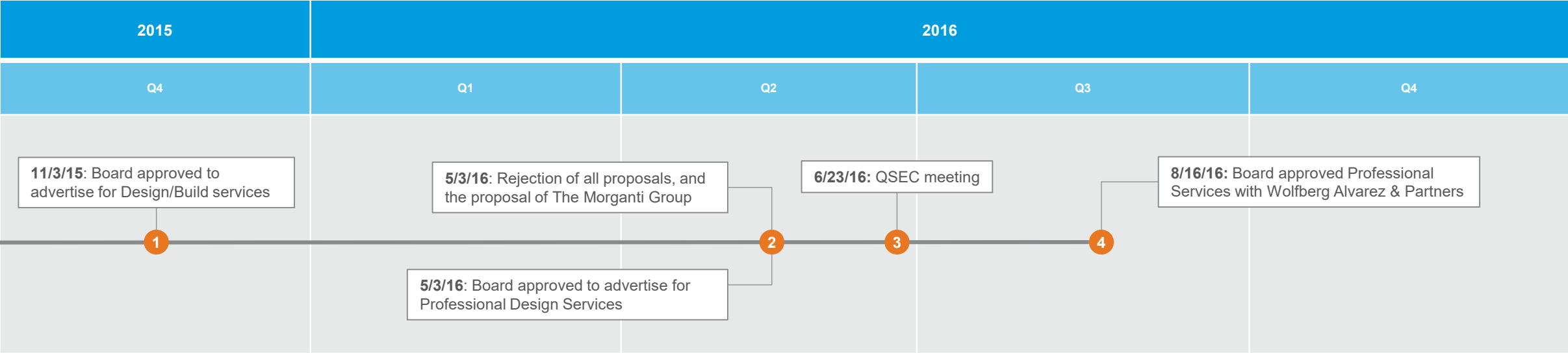


# Appendix B1

## Project Phase: Procure Designer (Actuals)

Blanche Ely High School

Phase Duration: 11/3/2015 – 8/16/2018  
Total Duration: 287 days



Milestones

- 1 Authorization to advertise bid for Design/Build Services (11/03/2015)
- 2 Rejection of all proposals for RFP 16-043C, and reject the proposal of The Morganti Group, Inc. as non-responsive; Board approved to advertise for Professional Design Services (05/03/2016)
- 3 QSEC meeting to discuss recommendations (06/23/2016)
- 4 Board approved Professional Services Agreement with Wolfberg Alvarez & Partners, Inc. ("Wolfberg Alvarez", "PSA") in the amount of \$911,900 (08/16/2016)

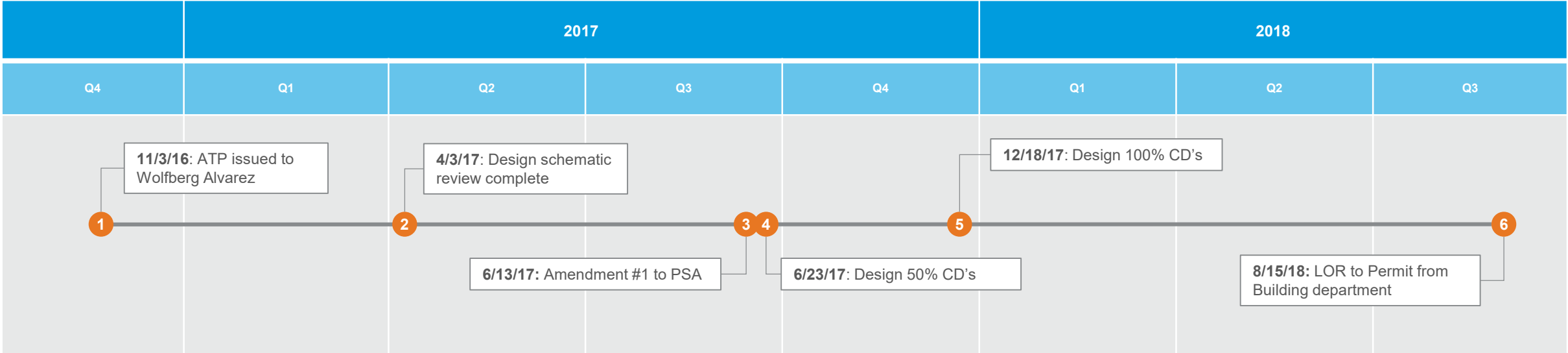


# Appendix B1

## Project Phase: Design (Actuals)

Blanche Ely High School

Phase Duration: 11/3/2016 – 8/15/2018  
Total Duration: 650 days



### Milestones

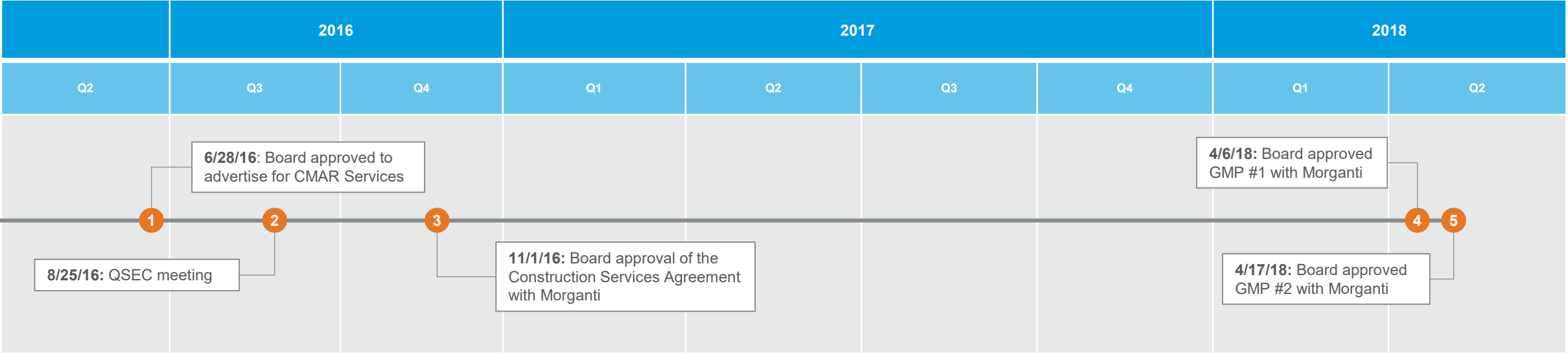
- 1 Authorization to Proceed issued (11/03/2016)
- 2 Design schematic review complete (04/03/2017)
- 3 First Amendment to PSA with Wolfberg Alvarez & Partners, Inc. in the amount of \$22,932 (06/13/2017)  
*Additional destructive/non-destructive testing increased by \$2,932 and the allowance for additional specific purpose surveys increased in the amount of \$20,000.*
- 4 Design 50% Construction Documents review complete (06/23/2017)
- 5 Design 100% Construction Documents prepared (12/18/2017)
- 6 Letter of Recommendation to Permit from SBBC Building Department (08/15/2018)



Appendix B1

Project Phase: Construction Procurement (Actuals) Blanche Ely High School

Phase Duration: 6/28/2016 – 4/17/2018  
Total Duration: 658 days



Milestones

- 1 Authorization to advertise for Construction Manager at Risk Services (06/28/2016)
- 2 QSEC meeting to discuss recommendations (08/25/2016)
- 3 Board approval of the Construction Services Agreement with The Morganti Group, Inc. (“Morganti”, “CSA”) in the amount of \$98,000 for the pre-construction phase (11/01/2016)
- 4 Board approved GMP #1 with The Morganti Group, Inc. in the amount of \$249,000 (04/06/2018)  
*GMP to establish the scope for Single Point of Entry (SPE). This project was prioritized prior to the remainder of the SMART renovation projects.*
- 5 Board approved GMP #2 with The Morganti Group, Inc. in the amount of \$17,992,000 for the remainder of the SMART scope items (04/17/2018)

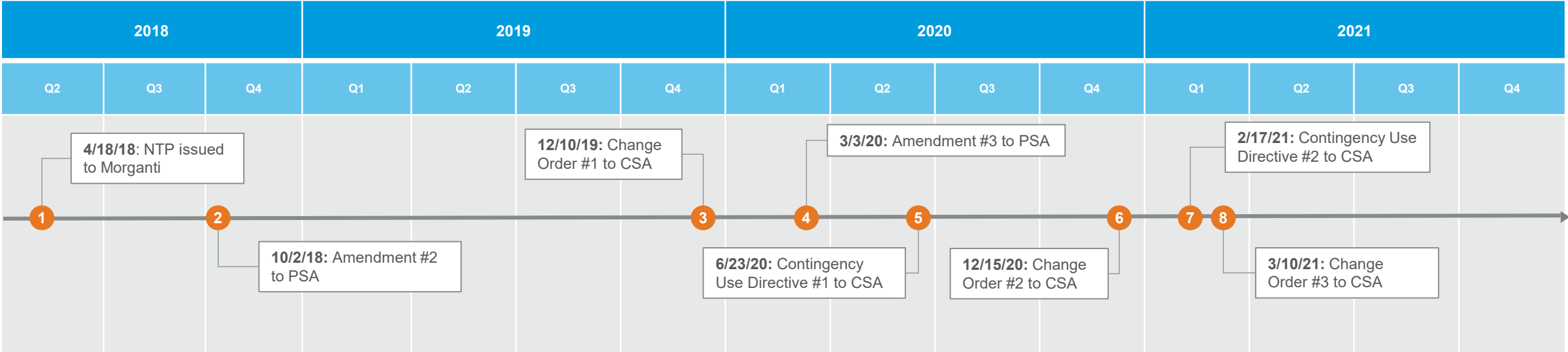


Appendix B1

Project Phase: Construction (Actuals)

Blanche Ely High School

Phase Duration: 4/18/2018 – 11/30/23 (current)  
Total Duration: 2,052 days (as of 11/30/23)



Milestones

- 1 Notice to Proceed was issued to The Morganti Group, Inc., with a required Substantial Completion no later than 8/1/2020 (04/18/18)

2 Second Amendment to PSA with Wolfberg Alvarez & Partners, Inc. in the amount of \$7,500 (10/02/2018)  
*This increase is required for forthcoming reproduction expenses that include, but not limited to, copies of construction documents, shop drawings, and blueprint reproduction*

3 Change Order #1 for The Morganti Group, Inc. in the amount of (\$9,531) (12/10/2019)  
*Return (credit) of the GMP contingency to the project contingency*
- 4 Third Amendment to PSA with Wolfberg Alvarez & Partners, Inc. in the amount of \$180,000 (03/03/2020)  
*To increase basic services fees due to additional efforts associated with roofing construction documents, modifications to existing roof drainage plans, and extended construction administration of 436 days. Included in the fee increase is a reduction in the amount of \$27,650 due to design delays.*

5 Decrease in contingency funds in the amount of \$97,141 and reallocate funds to the cost of work due to unforeseen conditions (The Morganti Group), but no impact to project budget (06/23/2020)

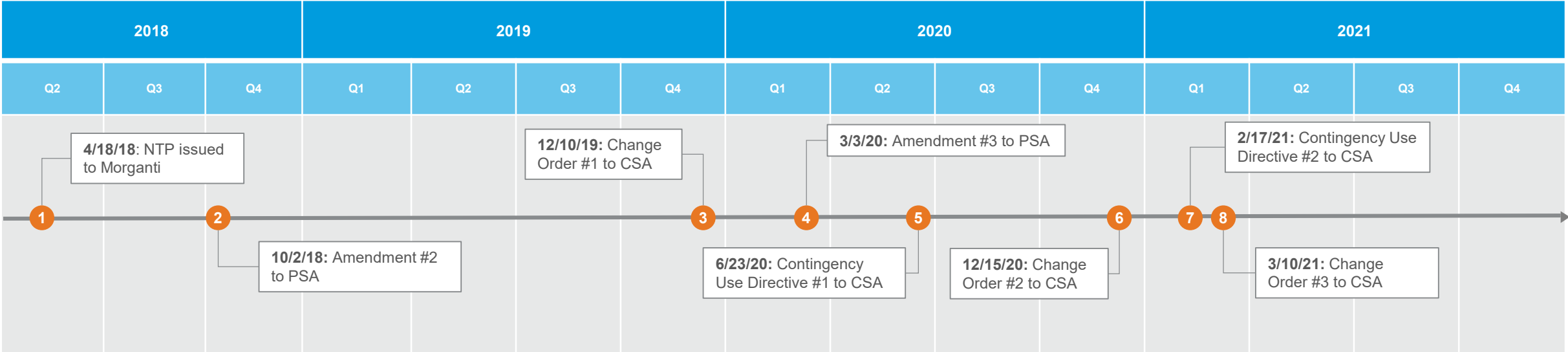


Appendix B1

Project Phase: Construction (Actuals) (Continued)

Blanche Ely High School

Phase Duration: 4/18/2018 – 11/30/23 (current)  
Total Duration: 2,052 days (as of 11/30/23)



Milestones (Continued)

- 6** Change Order #2 The Morganti Group, Inc. in the amount of \$22,630 (12/15/2020)

*During the testing of existing Air Handler systems, it was discovered that feeders for one of the units was insufficient and would require a new set of feeders to supply cool air. Additionally, it was discovered that the load on the existing electrical panel was too great and would require alternative service for one of the units.*
- 7** Decrease in contingency funds in the amount of \$89,453 and reallocate funds to the cost of work due to unforeseen conditions (The Morganti Group), but no impact to project budget (02/17/2021)
- 8** Change Order #3 The Morganti Group, Inc. in the amount of \$71,305 and an extension of 148 days (03/10/2021)

*The existing kitchen supply and exhaust fans on the rooftop at Building 1 are deteriorated beyond repair and must be replaced. Inclusive of the new equipment replacement, roofing re-work after new curbs and stands are installed will also be required to complete this scope of work.*

## Appendix B1

## Project Phase: Construction (Actuals) (Continued)

# Blanche Ely High School

Phase Duration: 4/18/2018 – 11/30/23 (current)  
Total Duration: 2,052 days (as of 11/30/23)

2021				2022				2023			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	<div>9</div> <div>5/18/21: Change Order #4 to CSA</div>	<div>10</div> <div>10/12/21: Change Order #5 to CSA</div>			<div>11</div> <div>6/22/22: Amendment #4 to PSA</div>	<div>12</div> <div>7/19/22: Change Order #6 to CSA</div>					

### Milestones (Continued)

- 9

Change Order #4 The Morganti Group, Inc. in the amount of \$26,182 (05/18/2021)

*It was determined the relocation of the disconnects would provide a better waterproofing detail and longer overall installation lifespan during the pre-construction roofing walkthrough.*

10

Change Order #5 The Morganti Group, Inc. in the amount of \$40,348 (10/12/2021)

*To perform maintenance on an existing chiller, relocating a transformer to be connected to the main grounding system (contract did not include this), provide additional labor and materials to add main grounding buss bar in electrical room 457, reinstall chillers to match rotation of the chillers.*

11

Fourth Amendment to PSA with Wolfberg Alvarez & Partners, Inc. in the amount of \$0 (06/22/2022)

*To approve updates to contract form 01250g. Project consultants are not always in agreement with the change order reason codes chosen by the PMOR and or the Owner. This Amendment is intended to improve the quality and clarity of the COI form while improving the durations in the processing of change orders on projects. The modification allows the Project Consultants to register their position without delays to the change order process.*

12

Change Order #6 The Morganti Group, Inc. in the amount of \$704 (07/19/2022)

*The Contractor is to provide labor and materials for the replacement of a lower door hinge for the ADA lift in Bldg 14.*
- RSM

## Appendix B2 - Board Actions Timeline Blanche Ely High School

Regular School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
11/3/2015	GOB Renovations	P.001646	J-5	9-0	Yes	Yes	The purpose of the Authorization to Advertise for Design/Build Services for Bid Package 1, and approve the RFP Form, and approve the Design/Build Standard Agreement Form, RFP 16-043C.	\$ -	0
5/3/2016	GOB Renovations	P.001646	J-9	8-0	Yes	Yes	The purpose is the rejection of all proposals for RFP 16-043C, and reject the proposal of The Morganti Group, Inc. ("Morganti") as non-responsive. In final review and preparation of the agenda items to award the three (3) RFPs to the Morganti Group, a document was discovered that qualified Morganti proposals to limit the project scope following design to align to their Costs of Service. This information was immediately reviewed with the General Counsel's Office to seek legal advice as to the process moving forward. It was recommended that the PMOR (Heery) contact Morganti for clarification. This effort affirmed their proposals to be non-responsive because they included impermissible qualification to the Costs of Service proposal.	\$ -	0
5/3/2016	GOB Renovations	P.001646	J-12	7-0	Yes	Yes	The purpose is authorization to advertise RFQ 16-165C, Professional Design Services for Blanche Ely Senior High School; approve the RFQ Form; and authorize the Professional Services Agreement (PSA) Form. This project has been appropriated in the Adopted District Facilities Plan (September 8, 2015) and in the District's Capital Budget. Total funds allocated for the scope included is \$14,795,436 and includes soft costs.	\$ 14,795,436.00	0
8/16/2016	GOB Renovations	P.001646	JJ-7	8-0	No	Received	Receive additional information regarding the Construction Manager at Risk Services (CMAR) request to advertise for Blanche Ely Senior High, Northeast Senior High School, and Stranahan Senior High School. Board approval to issue Request for Qualification (RFQ) for CMAR occurred at the Special School Board meeting on June 28, 2016. During the Board's deliberation, there was consideration to deter the items to a later date in order to provide an opportunity for the District's Audit Committee to provide feedback and an opportunity for select Board members not in attendance to ask questions and feedback.	\$ -	0
8/16/2016	GOB Renovations	P.001646	JJ-5	8-0	Yes	Yes	The purpose of the Professional Services Agreement (Construction Management At Risk Project Delivery) with Wolfberg Alvarez & Partners, Inc., SMART Program Renovations, Project No. P.001646, RFQ 16-165C. The Financial impact of the Professional Services Agreement includes \$862,400 for Basic Services and \$49,500 for Supplemental/Reimbursable Fees, totaling \$911,900.	\$ 911,900.00	0
11/1/2016	GOB Renovations	P.001646	JJ-6	8-0	No	Yes	The purpose of approving the recommendation for award of the Construction Services Agreement RFQ 16-192C; Lump Sum Pre-Construction Fee Award Amount: \$98,000; Vendor Awarded: The Morganti Group, Inc. This Project has been appropriated in the Adopted District Educational Facilities Plan, Fiscal Years 2016-17 for \$14,795,436.	\$ 98,000.00	0
6/13/2017	GOB Renovations	P.001646	JJ-4	6-0	No	Yes	The purpose of approving this First Amendment to the Professional Services Agreement with Wolfberg Alvarez and Partners, Inc., for the amount of \$22,932, Project No. P.001646, SMART Program Renovations, RFQ 16-165C. This First Amendment is to increase allowances to cover additional costs for non-destructive/destructive testing, and increase amount for additional specific survey allowances for proposed renovations to the outdoor dining facility.	\$ 22,932.00	0
6/27/2017	GOB Renovations	P.001646	JJ-2	8-0	Yes	Yes	The purpose of approving the First GMP Amendment to the Construction Services Agreement with The Morganti Group, Inc., Project No. P.001646 is to establish the Guaranteed Maximum Price (GMP) in the amount of \$249,000 for the Single Point of Entry (SPE) improvements. Funds for this project are included in the Adopted District Educational Facilities Plan, Fiscal Years 2016-17 to 2020-21.	\$ 249,000.00	0
4/23/2019	GOB Renovations	P.001683	J-1	5-0	Yes	Yes	The purpose is to approve the First Amendment to Construction Service Agreements Versions 1-3, Multiple Construction Managers for Construction Management at Risk (CMAR) Services, Multiple Projects, SMART Program Renovations. The purpose of the Amendment to these Construction Services Agreements is to insert language that requires Construction Management Firms to use e-Builder to manage their project(s). e-Builder is the District's (BCPS) adopted software platform for managing projects in the SMART Program. These Agreements were executed prior to having e-Builder language requirements included in them.	\$ -	0
6/23/2020	GOB Renovations	P.001646	JJ-11	9-0	No	Yes	The purpose of approving a decrease in the GMP 2 Contingency funds in the amount of \$97,141 and reallocate those funds to the cost of work due to unforeseen conditions, as provided for the agreement between The School Board of Broward County, Florida and the Construction Manager at Risk (CMAR), The Morganti Group, Inc. There is no impact to the project budget.	\$ -	0
12/15/2020	Single Point Entry	P.001646	JJ-9	9-0	Yes	Yes	The purpose of the approving the Final Change Order/Final Acceptance/Final Release Retainage, Blanche Ely High School, The Morganti Group Inc., Single Point of Entry for a credit in the amount of \$9,531 with no change in contract time.	\$ (9,531.00)	0

## Appendix B2 - Board Actions Timeline

### Blanche Ely High School

Regular School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
12/15/2020	GOB Renovations	P.001646	JJ-14	7-0	No	Yes	The purpose of approving Change Order #2, is adding the amount of \$22,630 with no change in contract duration, The Morganti Group, Inc., SMART Program Renovations, Project No. P.001646, RFQ 16-192C.	\$ 22,630.00	0
2/17/2021	GOB Renovations	P.001646	JJ-7	8-0	No	Yes	The purpose is a decrease in the GMP Contingency Funds in the amount of \$89,453 and reallocation of those funds to the cost of work due to unforeseen conditions, as provided for in the agreement between the School Board of Broward County and the Construction Manager at Risk, The Morganti Group Inc., P.001646, RFQ 16-192C.	\$ -	0
3/10/2021	GOB Renovations	P.001646	JJ-12	9-0	Yes	Yes	The purpose of Change Order #3 is adding the amount of \$71,305 and 148 days to contract duration. Pompano Beach, The Morganti Group, Inc., SMART Program Renovations, Project No. P.001646, RFQ 16-192C.	\$ 71,305.00	148
5/18/2021	GOB Renovations	P.001646	JJ-12	8-0	No	Yes	The purpose of Change Order #4 is adding the amount of \$26,182 with no change in contract duration - The Morganti Group, Inc., Pompano Beach, SMART Program Renovations, Project No. P.001646, RFQ 16-192C.	\$ 26,182.00	0
10/12/2021	GOB Renovations	P.001646	JJ-1	8-0	Yes	Yes	The purpose approving Change Orders for a combined sum of \$102,673 for Multiple Projects, including Blanche Ely HS (P.001684).	\$ 40,348.00	0
6/14/2022	GOB Renovations	P.001646	J-1	N/A	N/A	Yes	The purpose of the Fourth Amendment is to approve updates to the Form 02150g with the Professional Services Agreement with Wolfberg Alvarez and Partners, Inc. for Project No. P.001646, SMART Program Renovations, RFQ 16-165C. There is no impact to the project budget.	\$ -	0
7/19/2022	GOB Renovations	P.001646	JJ-6	8-0	No	Yes	The purpose of approving Change Order #6 is adding the amount of \$704 with no change to the contract duration - The Morganti Group, Inc., SMART Program Renovations, Project No. P.001646, RFQ 16-192C.	\$ 704.00	0
Operational School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
10/2/2018	GOB Renovations	P.001646	JJ-2	9-0	No	Yes	The purpose of approving the Second Amendment in the amount of \$7,500 to the Professional Services Agreement with Wolfberg Alvarez and Partners, Inc., Project No. P.001646, SMART Program Renovations, RFQ 16-165C. The purpose of this Second Amendment is to increase the Allowance for reproduction expenses. This increase is required for forthcoming reproduction expenses that include, but not limited to, copies of construction documents, shop drawings, and blue print reproduction.	\$ 7,500.00	0
12/10/2019	Single Point Entry	P.001646	JJ-9	9-0	Yes	Yes	The purpose of the approving the Final Change Order/Final Acceptance/Final Release Retainage, Blanche Ely High School, The Morganti Group Inc., Single Point of Entry for a credit in the amount of \$9,531 with no change in contract time.	\$ (9,531.00)	0
2/19/2020	GOB Renovations	P.001646	JJ-4	8-0	No	No	The purpose of this Third Amendment in the amount of \$180,000 to the Professional Services Agreement with Wolfberg Alvarez and Partners, Inc., RFQ 16-165C, is to increase Basic Services Fees due to additional efforts associated with roofing construction documents, modifications to existing roof drainage plans, and extended construction administration of 436 days. Included in the Basic Services Fee increase is a reduction in the amount of \$27,650 due to design delays for SMART Program Renovations for Blanche Ely High School. This motion was superseded by a Motion to Postpone.	\$ 180,000.00	436
3/3/2020	GOB Renovations	P.001646	JJ-4	8-0	Yes	Yes	The purpose of this Third Amendment in the amount of \$180,000 to the Professional Services Agreement with Wolfberg Alvarez and Partners, Inc., RFQ 16-165C, is to increase Basic Services Fees due to additional efforts associated with roofing construction documents, modifications to existing roof drainage plans, and extended construction administration of 436 days. Included in the Basic Services Fee increase is a reduction in the amount of \$27,650 due to design delays for SMART Program Renovations for Blanche Ely High School. This project has been appropriated in the Adopted District Educational Facilities Plan. There is no current impact to the project budget.	\$ 180,000.00	436

## Appendix B2 - Board Actions Timeline

### Blanche Ely High School

Special School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
6/28/2016	GOB Renovations	P.001646	7	5-0	Yes	Yes	The purpose is authorization to advertise RFQ 16-192C for Construction Manager at Risk Services for Blanche Ely High School; approve the RFQ Form; and approval of the CMAR Standard Agreement Form and General Conditions. This project has been appropriated in the Adopted District Educational Facilities Plan (September 8, 2015) and in the District's Capital Budget. Total funds allocated for the scope included is \$14,795,436 and includes soft costs.	\$ -	0
4/17/2018	GOB Renovations	P.001646	1	9-0	Yes	Yes	The purpose of the Second GMP Amendment is to establish \$17,992,000 as the GMP to the Construction Services Agreement dated November 1, 2016 with The Morganti Group, Inc., RFQ 16-192C, for the remaining SMART Program improvements. The scope of work for the Second GMP Amendment includes gymnasium accessibility, ADA stage lift, outdoor dining renovations, fire sprinklers, HVAC improvements, building envelope improvements, STEM lab improvements, media center improvements, and IAQ and fascia replacement. The Second GMP Amendment submitted by The Morganti Group, Inc. exceeds the available funds and requires additional funding in the amount of \$7,310,000 to proceed.	\$ 17,992,000.00	0



## **APPENDIX C – NORTHEAST HIGH SCHOOL**

### ***PROJECT PERFORMANCE REPORTS & BOARD ACTION TIMELINES***

Appendix C1

Project Performance Report

(as of November 2023)

Northeast High School

Project Name	Northeast High School	Financial Summary			
Project Number	P.001684	Original Budget	Current Budget	Current Commitments	Actuals Approved
Project Name	SMART Program Renovations	\$14,426,000	\$24,686,831	\$24,111,341	\$20,037,132
Delivery Method	RFQ - CMAR	Drivers of Budget Change <sup>2</sup>			
Project Phase	Construction	Design 44% ↑	Construction 67% ↑	Program Mgmt. 115% ↑	
Project Consultant	ACAI Associates, Inc.	Budget for basic fees for professional services increased by 32%, primarily due to five (5) additive PSA amendments, totaling \$449,119.	GMP #2 (\$19,996,611) exceeded available funding at the time of execution, resulting in a total budget increase of \$10,706,440 on 4/21/20. As of November 2023, the “Bldg Improv & Contract” budget increased by 76%.	The current budget for “direct purchases” exceeded the original budget by \$1,333,886.	
Contractor	James B. Pirtle Construction Company, Inc.	Construction Change Order Breakdown			
Project Scope (per SMART “School Spotlight”)		Construction Changes	Change Order Categories by Cost (%)		
Re-roofing Buildings #1, 2, 3, 5, 6, 7, 12, 15, 17, 25, 85 & 86. Exterior door & window replacement. Complete fire alarm system replacement. Fire sprinkler upgrades at Buildings 1, 3, 4, 5, 6 and 7. Selective ceiling replacement for fire sprinkler installation. ADA restroom renovations of restrooms 101 & 102, 117 & 119 and Building #3 restrooms 189, 191 and 194. Renovation of Building #1 Life Science S.T.E.M. Labs rooms 142 & 153, 146 Teacher planning. Building #3 Culinary STEM Lab room 194 with associated food service equipment. Building #3 Fabrication STEM Lab. Building #4 Auditorium mechanical, electrical and controls upgrades. Music Building #5 renovations. Electrical work to support new HVAC systems. HVAC SOW: Building 2 chiller replacement, various AHU replacement, Digital Direct Controls & EMS upgrades. Test and Balance.		14 Total change orders 36 Total change items 285 Days extended \$336.6K Net change	<div><div></div>70.5% Consultant Error or Omission</div> <div><div></div>29% Owner Request</div> <div><div></div>0.5% Unforeseen Condition</div>		
Cost Breakdown by Category (\$) <sup>1</sup>					
\$1,552,406	Cost for professional services (design)				
\$15,257,760	Cost for construction services				
\$3,226,966	Program management fees and other miscellaneous construction costs (i.e., PM fees, labor allocations, equipment purchases, etc.)				

<sup>1</sup> Based on actuals approved    <sup>2</sup> Compares the "2014 Original Budget to the "Current Budget" (see "Financial Summary on following page for detail)

Appendix C1

Financial Summary

(as of November 2023)

Northeast High School

Financial Summary						
Budget Description	RSM Category	2014 Original Budget	Current Budget	Current Commitments	Actuals Approved	Current Budget vs. Original Budget
Basic Fees	Design	910,300.00	1,506,701.60	1,506,341.26	1,448,669.76	596,401.60
Supplementary Services	Design	91,500.00	101,500.00	101,500.00	88,701.86	10,000.00
Misc. Consultants	Design	35,000.00	29,168.00	29,718.96	15,034.42	(5,832.00)
Project Contingency	Design	100,000.00	0.40	-	-	(99,999.60)
Subtotal		1,136,800.00	1,637,370.00	1,637,560.22	1,552,406.04	500,570.00
Construction Mgmt. Fees <sup>1</sup>	Program Management / Other	125,000.00	105,000.00	105,000.00	105,000.00	(20,000.00)
Construction Mgmt. Fees	Program Management / Other	1,134,666.00	1,308,734.00	1,308,734.00	1,308,734.00	174,068.00
Misc. Construction	Program Management / Other	426,000.00	36,264.00	36,004.88	35,722.88	(389,736.00)
Comm Infrastructure	Program Management / Other	-	52,207.00	52,206.59	19,941.16	52,207.00
Legal Costs	Program Management / Other	-	120,000.00	120,000.00	120,000.00	120,000.00
Cafeteria	Program Management / Other	-	417,062.00	417,061.10	417,061.10	417,062.00
Utility Connections	Program Management / Other	24,397.00	13,227.00	10,584.95	4,525.98	(11,170.00)
Basic Classroom FFE	Program Management / Other	-	284,938.00	58,553.91	45,554.79	284,938.00
Audio Visual	Program Management / Other	-	-	7,476.00	5,186.00	-
Technical Equipment	Program Management / Other	-	8,000.00	-	-	8,000.00
Direct Purchase	Program Management / Other	-	1,333,885.87	1,275,537.54	1,165,239.74	1,333,885.87
Subtotal		1,710,063.00	3,679,317.87	3,391,158.97	3,226,965.65	1,969,254.87
Bldg. Improv & Contract	Construction	11,027,750.00	19,370,143.13	19,082,621.84	15,257,759.92	8,342,393.13
Construction Contingency	Construction	551,387	-	-	-	(551,387.00)
Subtotal		11,579,137.00	19,370,143.13	19,082,621.84	15,257,759.92	7,791,006.13
Total		14,426,000.00	24,686,831.00	24,111,341.03	20,037,131.61	10,260,831.00

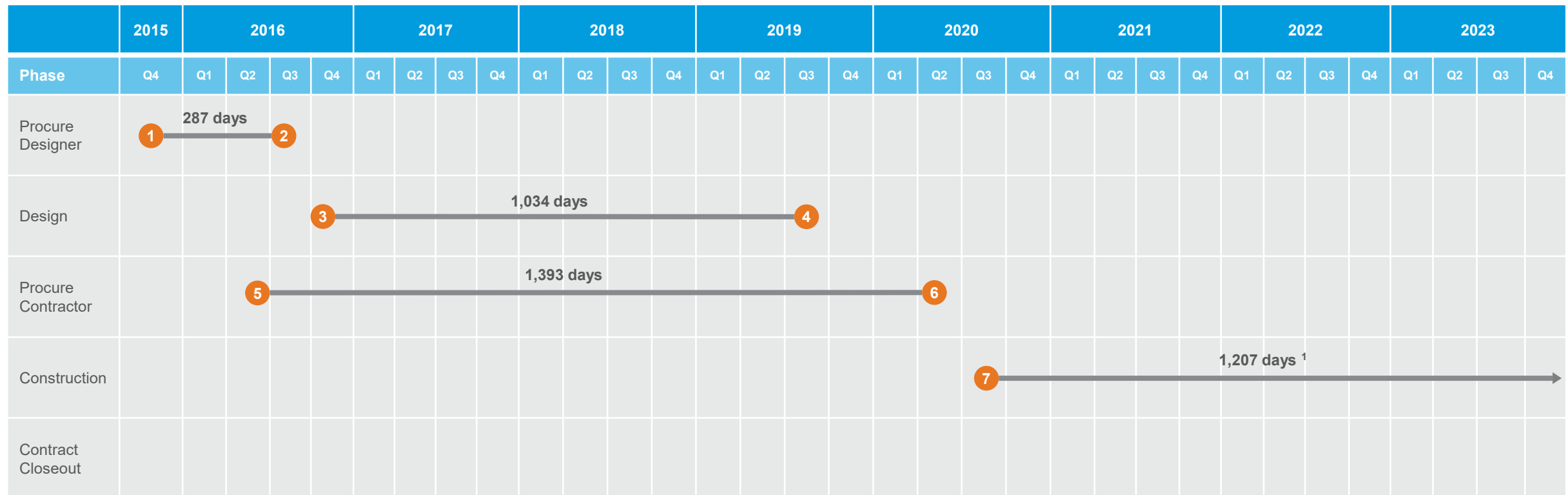


# Appendix C1

## Project Milestones: Actuals

(as of November 2023)

# Northeast High School



<sup>1</sup> Construction ongoing, as of November 30, 2023.

## Milestones

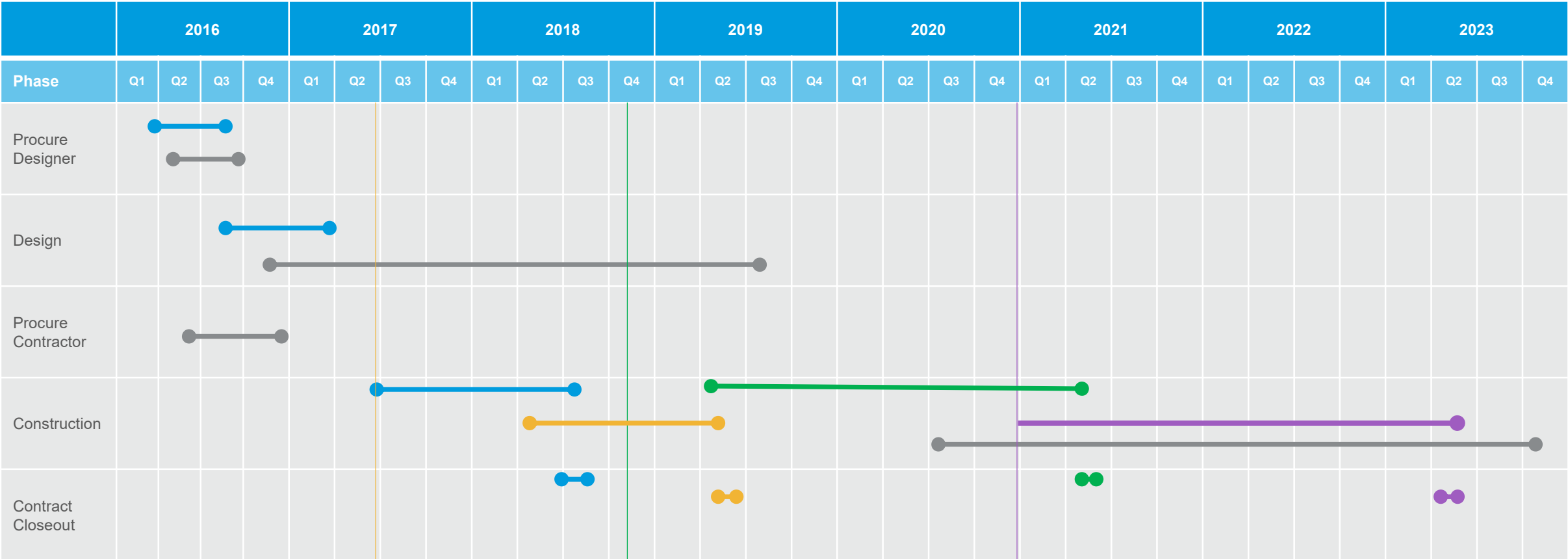
- |   |  |
|---|--|
| 1 Board approve to advertise (11/03/15) | 6 Board approve GMP #2 (04/21/20)                |
| 2 Board award date (08/16/16)           | 7 Issue NTP to Contractor (08/10/20)             |
| 3 ATP date (10/20/16)                   | 8 Substantial completion date <sup>1</sup> (TBD) |
| 4 LOR permit date (08/20/19)            | 9 Contract close-out date (TBD)                  |
| 5 Board approve to advertise (06/28/16) |  |

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Appendix C1

Project Milestones: Schedule Comparison  
*(as of November 2023)*

Northeast High School



- BOC Schedule (August 2016)
- Heery Baseline Schedule (June 2017)
- Heery Rebaseline Schedule (October 2018)
- AECOM Rebaseline Schedule (December 2020)
- Actual Schedule (e-Builder)

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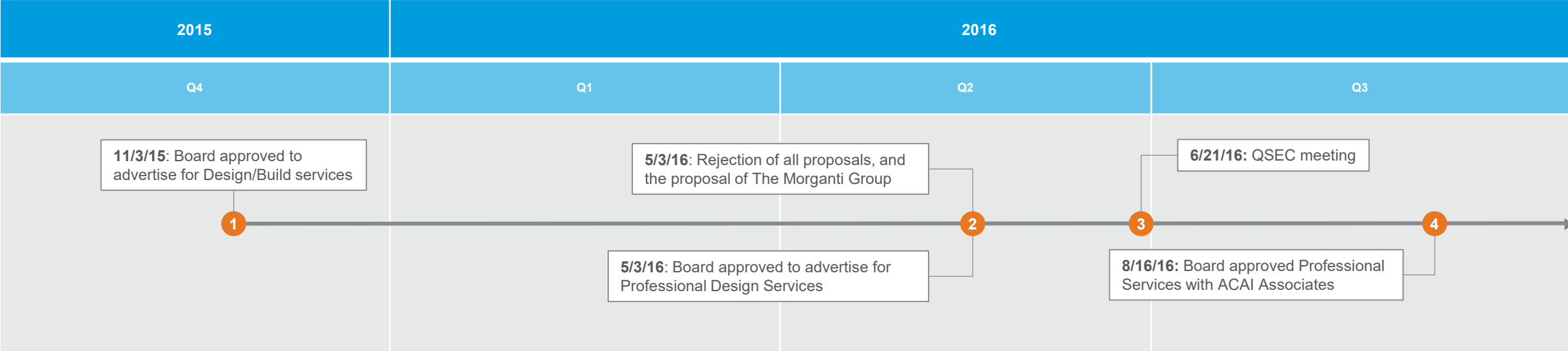


Appendix C1

Project Phase: Procure Designer (Actuals)

Northeast High School

Phase Duration: 11/3/15 – 8/16/16  
Total Duration: 287 days



Milestones

- 1 Authorization to advertise bid for Design/Build Services (11/03/2015)
- 2 Rejection of all proposals for RFP 16-072F, and reject the proposal of The Morganti Group, Inc. as non-responsive; Board approved to advertise for Professional Design Services (05/03/2016)
- 3 QSEC meeting to discuss recommendations (06/21/2016)
- 4 Board approved Professional Services Agreement with ACAI Associates, Inc. (“ACAI”, “PSA”) in the amount of \$955,000 (08/16/2016)

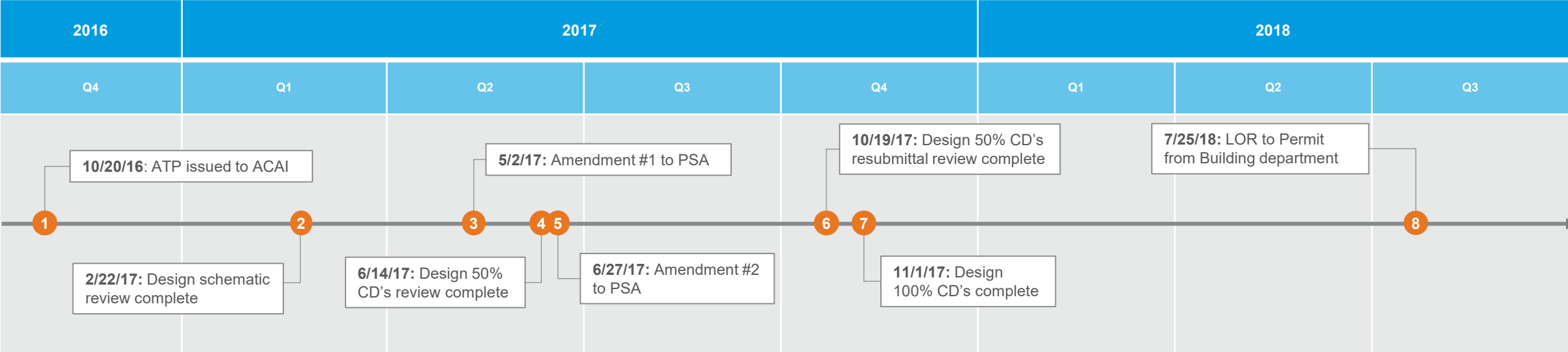


Appendix C1

Project Phase: Design (Actuals)

Northeast High School

Phase Duration: 10/20/2016 – 7/25/2018  
Total Duration: 643 days



Milestones

- 1

Authorization to Proceed issued to ACAI Associates, Inc. (10/20/2016)
- 2

Design schematic review complete (02/22/2017)
- 3

First Amendment to PSA with ACAI Associates, Inc. in the amount of \$30,300 (05/02/17)  
*To increase basic service fees to cover the Acceleration of the Design for SPE, ADA Restrooms & Décor and Hardware Replacement Design, and the Planning/Programming Services for Swing Space. Currently, this project schedule has construction commencing in March 2018. This amendment will allow the acceleration of the design of the SPE. ADA Restrooms & Door and Hardware Replacement to follow shortly thereafter.*
- 4

Design 50% Construction Documents review complete (06/14/2017)
- 5

Second Amendment to PSA with ACAI Associates, Inc. in the amount of \$16,500 (06/27/2017)  
*To increase the allowance fees for additional pre-design testing – including destructive/non-destructive testing, and to perform test and balance of the HVAC system to evaluate the condition of the roof.*
- 6

Design 50% Construction Documents resubmittal review complete (10/19/2017)
- 7

Design 100% Construction Documents complete (11/01/2017)
- 8

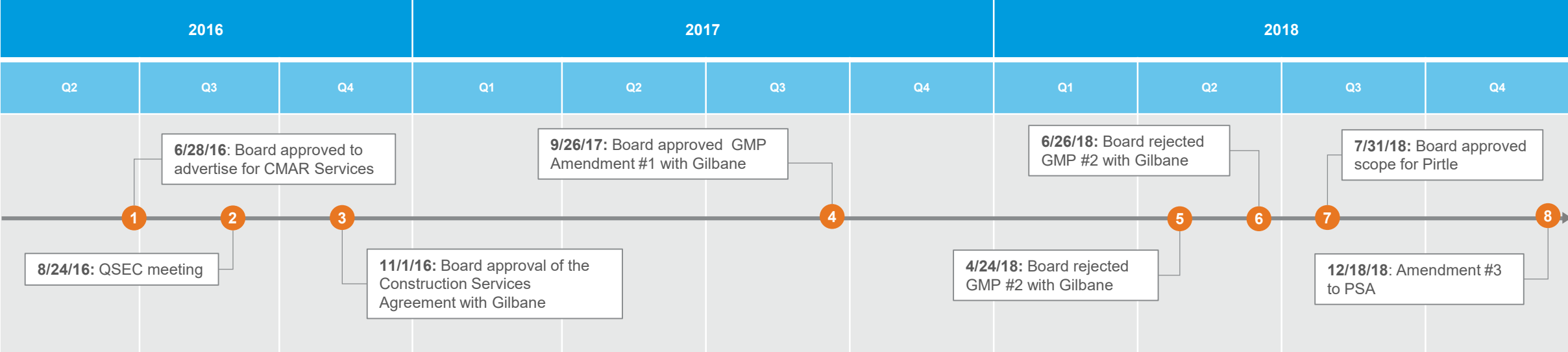
Letter of Recommendation to Permit issued by the Building department (07/25/2018)



Appendix C1

Project Phase: Construction Procurement (Actuals) Northeast High School

Phase Duration: 6/28/2016 – 4/21/2020  
Total Duration: 1,393 days



Milestones

- 1

Authorization to advertise for Construction Manager at Risk Services (06/28/2016)
- 2

QSEC meeting to discuss recommendations (08/24/2016)
- 3

Construction Services Agreement with Gilbane Building Company, Inc. (“Gilbane”, “CSA”) in the amount of \$125,000 for the pre-construction phase (11/01/2016)
- 4

Board approved GMP Amendment #1 with Gilbane Building Company, Inc. in the amount of \$601,436 (09/27/2017)  
*GMP to establish the scope for Single Point of Entry (SPE). This project was prioritized prior to the remainder of the SMART renovation projects.*
- 5

Board rejected GMP Amendment #2 in the amount of \$16,910,000 (04/24/2018)  
*To establish the scope for the remainder of the SMART renovations projects, including: safety/security upgrade, fire sprinklers, fire alarm, weight room relocation, STEM lab improvements, HVAC improvements, electrical improvements, re-roofing, and ADA renovations related to educational adequacy.*
- 6

Board rejected GMP Amendment #2 in the amount of \$16,910,000 (06/26/2018)
- 7

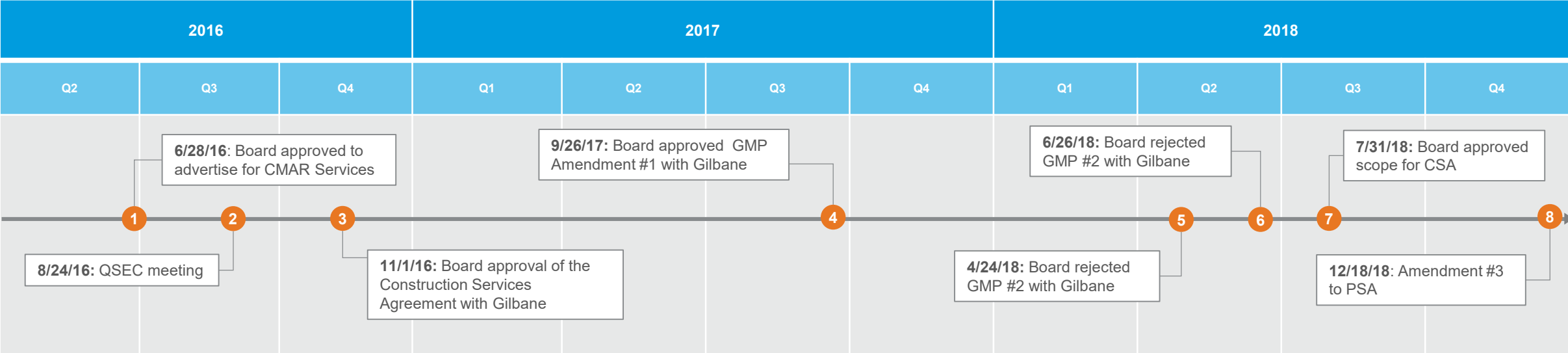
Board approved scope for Construction Services Agreement with James B. Pirtle Construction Company, Inc. (07/31/2018)



# Appendix C1

## Project Phase: Construction Procurement (Actuals) Northeast High School

Phase Duration: 6/28/2016 – 4/21/2020  
Total Duration: 1,393 days



Milestones (Continued)

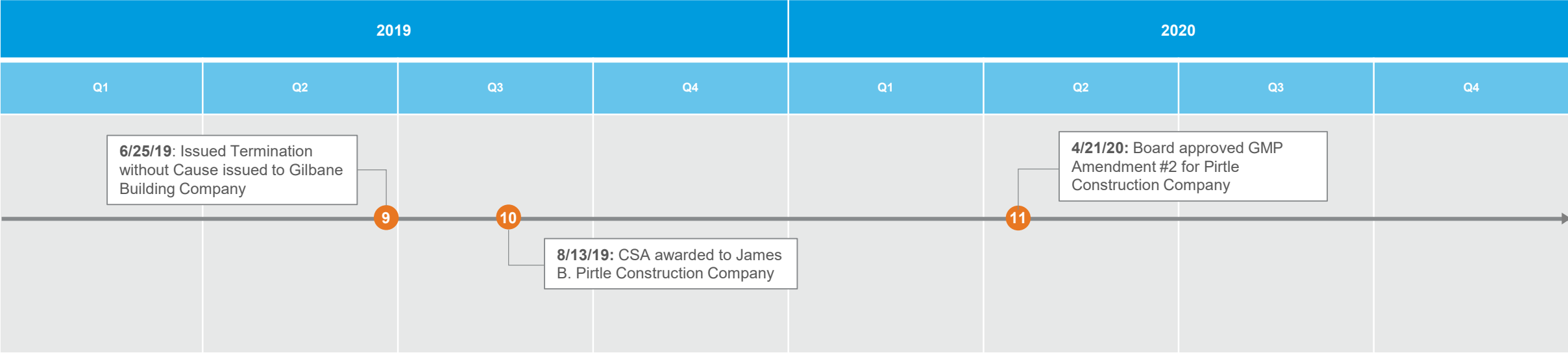
- 8** Third Amendment to PSA with ACAI Associates, Inc. in the amount of \$37,597 (12/18/2018)  
*Remove all scope associated with Building 12, with the exception of the roof replacement and weight room scope and remove Building HVAC scope. To increase basic fees to perform an additional bidding phase and provide a credit for the warranty phase for the reduction in scope.*



Appendix C1

Project Phase: Construction Procurement (Actuals) Northeast High School

Phase Duration: 6/28/2016 – 4/21/2020  
Total Duration: 1,393 days



Milestones (Continued)

- 9 Termination without Cause issued to Gilbane Building Company, Inc. (06/25/2019)
- 10 Construction Services Agreement awarded to James B. Pirtle Construction Company, Inc. (“Pirtle”, “CSA”) in the amount of \$105,000 for the pre-construction phase (08/13/2019)
- 11 Board approved GMP Amendment #2 in the amount of \$19,996,611 (04/21/2020)  
*To establish the scope for the remainder of the SMART renovations projects, including: fire alarm, fire sprinklers, safety/security upgrades, ADA renovations related to educational adequacy, re-roofing, electrical improvements, HVAC improvements, and STEM Lab improvements. Scope to provide fire sprinklers to Buildings 1 and 3-12 were reviewed by the Task Assigned District’s Chief Fire Official who determined that Buildings 1,4, and 10 were the only buildings that required fire sprinklers. Buildings 2, 5-9, 11, and 12 did not require fire sprinklers and were removed from the scope of work, prior to bidding.*

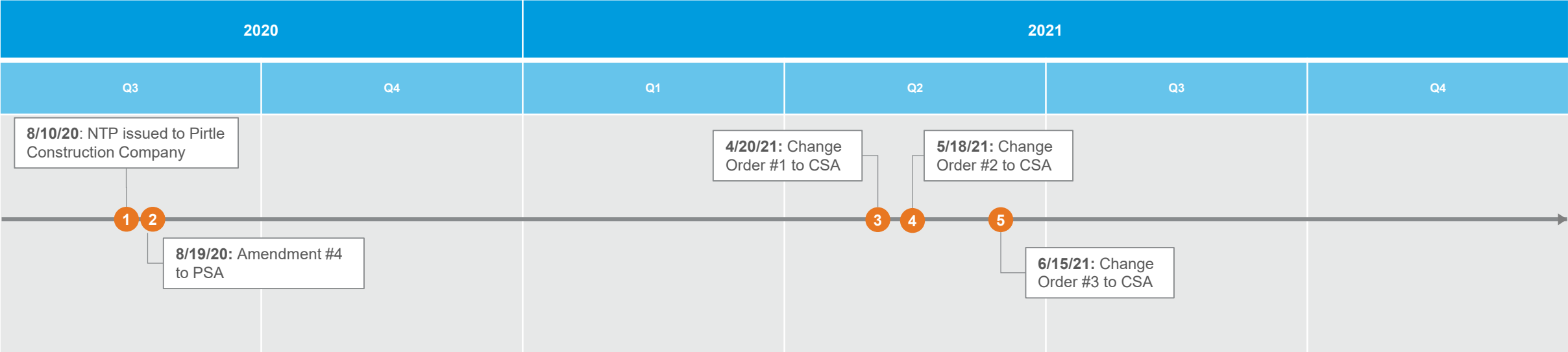


Appendix C1

Project Phase: Construction (Actuals)

Northeast High School

Phase Duration: 8/10/2020 – 11/30/23 (current)  
Total Duration: 1,207 days (as of 11/30/23)



Milestones

- 1

Notice to Proceed was issued to Pirtle Construction Company, Inc., with a required Substantial Completion no later than 818 days (08/10/2020)
- 2

Fourth Amendment to PSA with ACAI Associates, Inc. in the amount of \$364,722 (08/19/2020)  
*To increase basic fees for fire sprinklers, stormwater drainage, repairs to damaged roof, and contract administration fees associated with scope revisions.*
- 3

Board approved Change Order #1 with Pirtle Construction Company, Inc. in the amount of \$19,621 (04/20/2021)  
*To increase basic fees to build two new concrete beams above Building 12 overhead rolling doors, installation of wall insulation, create ADA egress path for Building 12, and replacement of a roof-top exhaust fan.*
- 4

Board approved Change Order #2 with Pirtle Construction Company, Inc. in the amount of \$16,066 (05/18/2021)  
*Increase in basic fees due to missing information in the construction documents hardware schedule, three new doors require panic exit hardware by code. Additionally, an increase in fees to use contractor resources to remove and dispose of materials.*
- 5

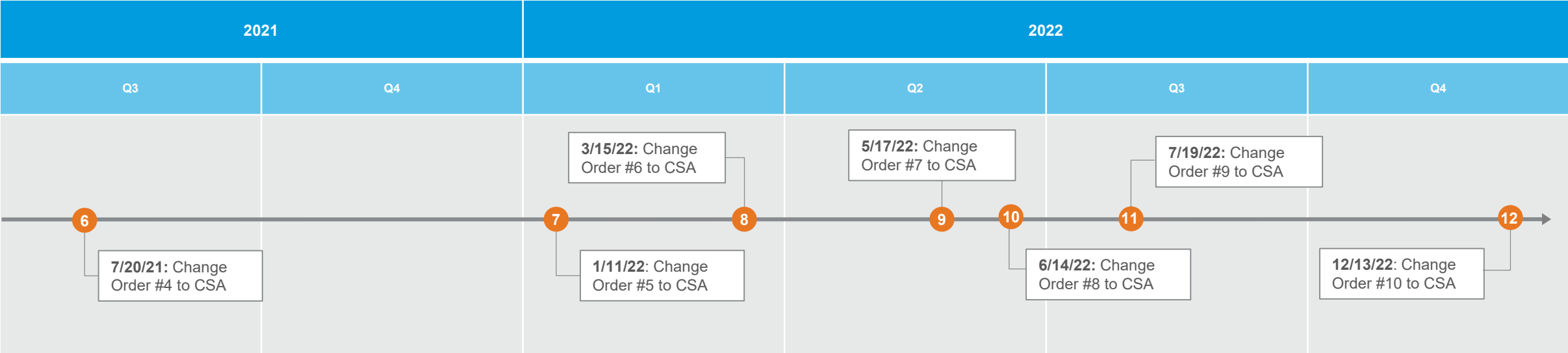
Board approved Change Order #3 with Pirtle Construction Company, Inc. in the amount of \$7,898 (06/15/2021)  
*During inspection, it was determined that the egress from door 325A was not code-compliant without a ramp and railing installation. Therefore, labor, equipment, and materials are required to build an exit landing with ramp and handrail for Building 12.*



Appendix C1

Project Phase: Construction (Actuals) (Continued) Northeast High School

Phase Duration: 8/10/2020 – 11/30/23 (current)  
Total Duration: 1,207 days (as of 11/30/23)



Milestones (Continued)

- 6 Board approved Change Order #4 with Pirtle Construction Company, Inc. in the amount of \$9,213 (07/20/2021)  
*Increase in fees to replace an existing gravity ventilator and refinish existing penthouse doors on roof of Building 3 and install lab casework and counters in Building 1 Room 146.*

7 Board approved Change Order #5 with Pirtle Construction Company, Inc. in the amount of \$16,501 (01/11/2022)  
*Increase in fees for Building 15 gutters and downspout installation; installation of new air intake system, due to a deficiency discovered; installation of lab casework and counters in Building 1 Room 146 due to requirement by code (original contract drawing did not include replacing the doors); installation of power circuits for Building 12 Room 325A for new gym equipment that was not in the scope of work.*
- 8 Board approved Change Order #6 with Pirtle Construction Company, Inc. in the amount of \$7,383 (03/15/2022)  
*Increase in fees for the connection of room receptacles to emergency shutoff panel.*

9 Board approved Change Order #7 with Pirtle Construction Company, Inc. in the amount of \$18,952 (05/17/2022)  
*Increase in fees to provide additional labor, materials, and equipment to install a new roof expansion joint at Building 1.*

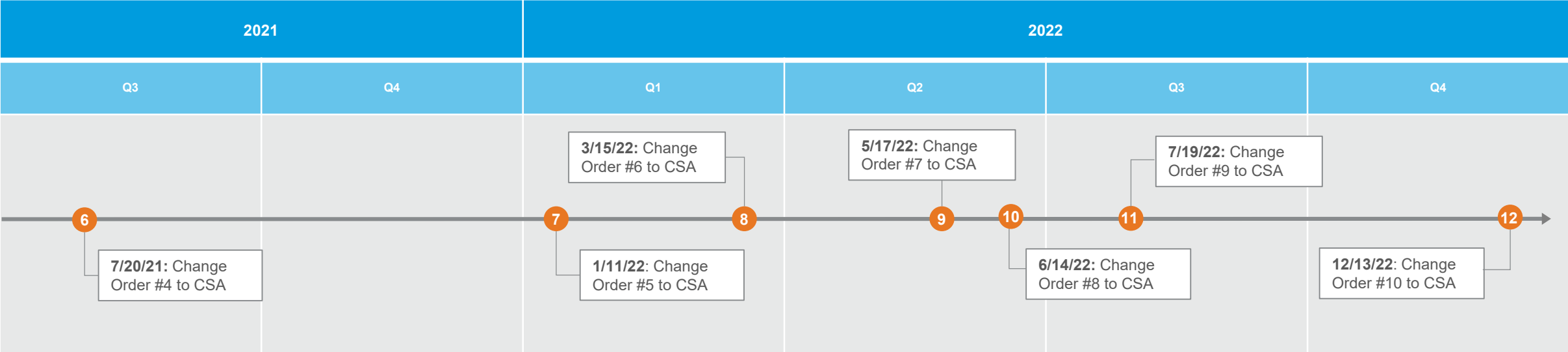
10 Board approved Change Order #8 with Pirtle Construction Company, Inc. in the amount of \$35,361 (06/14/2022)  
*Increase in fees to provide additional labor, materials, and equipment to install lightweight concrete and expanded polystyrene insulation board on Building 1 center roof area.*



# Appendix C1

## Project Phase: Construction (Actuals) (Continued) Northeast High School

Phase Duration: 8/10/2020 – 11/30/23 (current)  
Total Duration: 1,207 days (as of 11/30/23)



Milestones (Continued)

- 11

Board approved Change Order #9 with Pirtle Construction Company, Inc. in the amount of \$45,273 (07/19/2022)

*Increase in fees to provide labor, material, and equipment to reroof the covered walkway roof at the south side of Building 6.*
- 12

Board approved Change Order #10 with Pirtle Construction Company, Inc. in the amount of \$67,540 (12/13/2022)

*Increase in fees to provide labor, material, and equipment for added electrical, plumbing, concrete cutting, patching, and relocation of existing ductwork trunk at Building 3 Culinary STEM lab.*

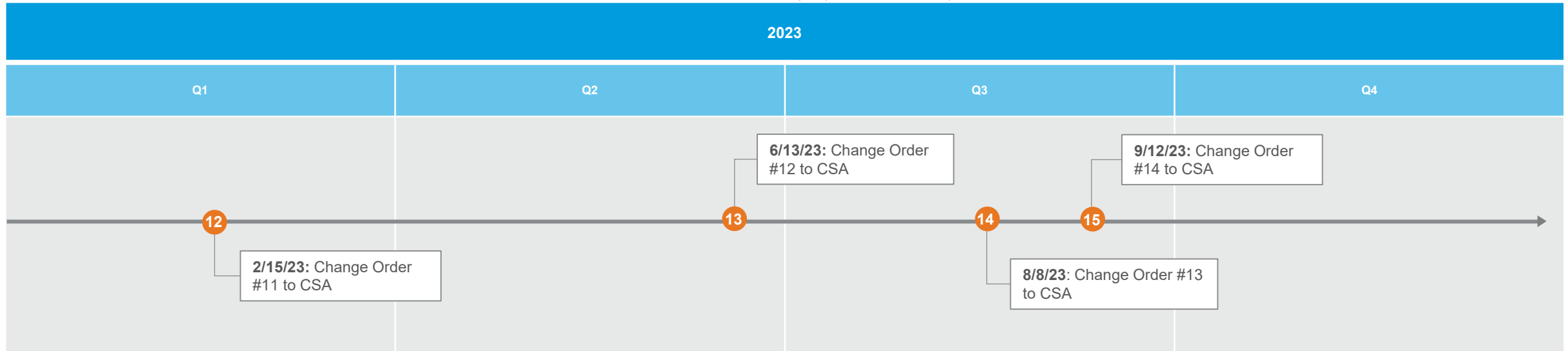


# Appendix C1

## Project Phase: Construction (Actuals) (Continued)

# Northeast High School

Phase Duration: 8/10/2020 – 11/30/23 (current)  
Total Duration: 1,207 days (as of 11/30/23)



## Milestones

- 12 Board approved Change Order #11 with Pirtle Construction Company, Inc. in the amount of \$50,360 (02/15/2023)  
*During construction it was discovered that panic hardware installation was required for the doors to be code compliant. Additionally, the inspector required the Contractor to install new HVAC disconnect switches on Buildings 85 and 86, and install new fire alarm duct detectors and new controls for existing air handling unit in Building 3. The Contractor also provided labor, material, and equipment to install a new expansion joint on Building 5 upper roof.*
  - 13 Board approved Change Order #12 with Pirtle Construction Company, Inc. in the amount of \$35,827 (06/13/2023)  
*Increase in fees to install new controls for all existing VAV's in Building 3. During construction it was discovered that the mechanical room penthouses at Building 1 and 3 roofs require fire protection and installation. Additionally it was discovered that there is a space in the panels but no existing circuits, therefore the Contractor must install circuits for Building 1 penthouse supply fan's power.*
  - 14 Board approved Change Order #13 with Pirtle Construction Company, Inc. in the amount of \$6,607 (08/08/2023)  
*Increase in fees to install wall tiles in the Culinary lab.*
  - 15 Board approved Change Order #14 with Pirtle Construction Company, Inc. in the amount of \$1,653 and 285 days (9/12/2023)  
*Contractor requested a time extension due to inspector requests for evaluations and calculations that were not a part of the initial construction documents and require additional design services. Additionally, during construction, it was discovered that water penetrated through four (4) existing doorways into the Building 1 Mechanical Penthouse.*

## Appendix C2 - Board Actions Timeline Northeast High School

Regular School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
11/3/2015	SMART Program Renovations	P.001684	J-5	9-0	Yes	Yes	The purpose of the Authorization to Advertise for Design/Build Services for GCB Renovations , Project No. P.001684, and approve the RFP Form, and approve the Design/Build Standard Agreement Form, RFP 16-072F.	\$ -	0
5/3/2016	SMART Program Renovations	P.001684	J-7	8-0	Yes	Yes	The purpose is the rejection of all proposals for RFP 16-072F, and reject the proposal of The Morganti Group, Inc. ("Morganti") as non-responsive. In final review and preparation of the agenda items to award the three (3) RFPs to the Morganti Group, a document was discovered that qualified Morganti proposals to limit the project scope following design to align to their Costs of Service. This information was immediately reviewed with the General Counsel's Office to seek legal advice as to the process moving forward. It was recommended that the PMOR (Heery) contact Morganti for clarification. This effort affirmed their proposals to be non-responsive because they included impermissible qualification to the Costs of Service proposal.	\$ -	0
5/3/2016	SMART Program Renovations	P.001684	J-10	7-0	Yes	Yes	The purpose is authorization to advertise RFQ 16-166C, Professional Design Services for Northeast Senior High School; approve the RFQ Form; and authorize the Professional Services Agreement (PSA) Form. This project has been appropriated in the Adopted District Educational Facilities Plan (September 8, 2015) and in the District's Capital Budget. Total funds allocated for the scope included is \$14,547,000 and includes soft costs. Financial obligations will take place at a future Board meeting when approval is requested to award Professional Design Services.	\$ 14,547,000.00	0
8/16/2016	SMART Program Renovations	P.001684	JJ-7	8-0	No	Received	Receive additional information regarding the Construction Manager at Risk Services (CMAR) request to advertise for Blanche Ely Senior High, Northeast Senior High School, and Stranahan Senior High School. Board approval to issue Request for Qualification (RFQ) for CMAR occurred at the Special School Board meeting on June 28, 2016. During the Board's deliberation, there was consideration to deter the items to a later date in order to provide an opportunity for the District's Audit Committee to provide feedback and an opportunity for select Board members not in attendance to ask questions and feedback.	\$ -	0
8/16/2016	SMART Program Renovations	P.001684	JJ-6	8-0	Yes	Yes	The purpose of Professional Services Agreement (Construction Management At Risk Project Delivery) with ACAI Associates, Inc., SMART Program Renovations , Project No. P.001684, RFQ 16-166C. The Financial impact of the Professional Services Agreement includes \$880,000 for Basic Services and \$75,000 for Supplemental/Reimbursable Fees, totaling \$955,000.	\$ 955,000.00	0
11/1/2016	SMART Program Renovations	P.001684	JJ-5	8-0	No	Yes	The purpose of approving the recommendation for award of the Construction Services Agreement RFQ 16-194C; Lump Sum Pre-Construction Fee Award Amount: \$125,000; Vendor Awarded: Gilbane Building Company. This Project has been appropriated in the Adopted District Educational Facilities Plan, Fiscal Years 2016-17, Page 142, amount of \$14,547,000.	\$ 125,000.00	0
6/27/2017	SMART Program Renovations	P.001684	JJ-4	8-0	Yes	Yes	The purpose of the Second Amendment to the Professional Services Agreement with ACAI Associates, Inc., Project No. P.001684, RFQ 16-166C, is to increase the allowance fees for additional pre-design testing in the amount of \$16,500. This will enable the designer to proceed with further destructive/non-destructive testing, and to perform test and balance of the HVAC system to evaluate the condition of the roof.	\$ 16,500.00	0
4/24/2018	SMART Program Renovations	P.001684	JJ-6	7-0	Yes	No	The purpose of the Second GMP Amendment to the Construction Services Agreement with Gilbane Building Company, Project No. P.001684, RFQ 16-194C, is to approve the use of CDI/Subguard and approve additional funding in the amount of \$16,910,000. The financial impact of approving this Second GMP Amendment is \$26,559,715. Motion was made to postpone.	\$ 26,559,715.00	0
6/26/2018	SMART Program Renovations	P.001684	JJ-7	0-8	Yes	No	The purpose of approving the Second GMP Amendment to the Construction Services Agreement with Gilbane Building Company, Project No. P.001684, RFQ 16-194C, is to approve the use of CDI/Subguard, and approve additional funding in the amount of \$16,910,000. The financial impact of approving this Second GMP Amendment is \$26,559,715.	\$ 26,559,715.00	0
7/24/2018	SMART Program Renovations	P.001684	JJ-11	8-0	Yes	No	The purpose of approving Base Recommendation and any of the Alternates is to modify the original SMART Program Improvements, including the preparation and issuance of a new Request for Qualifications to hire a Design Professional and a Construction Manager associated with the Board approved scope modifications. This motion was superseded by a Motion to Postpone.	\$ -	0
12/18/2018	New Addition and Renovations to Building 12	P.002301	JJ-4	6-0	No	Yes	The purpose is approving the Professional Services Agreement (Construction Management at Risk Project Delivery) with Zyscovich, Inc., for the total amount of \$1,025,000, New Addition and Renovation to Building 12, Project No. P.002301, RFQ 19-077C. The financial impact of the PSA includes \$915,000 for Basic Services, \$65,000 for Allowances, and \$45,000 for Supplemental Services totaling \$1,025,000; this item amends the Adopted District Educational Facilities Plan in the amount of \$17,840,962.	\$ 1,025,000.00	0

## Appendix C2 - Board Actions Timeline Northeast High School

Regular School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
12/18/2018	SMART Program Renovations	P.001684	JJ-7	6-0	Yes	Yes	The purpose is the approval of the Third Amendment to the Professional Services Agreement (Construction Management at Risk Project Delivery) with ACAI Associates, Inc., Project No. P.001684, SMART Program Renovations, RFQ 16-166C, in the amount of \$37,597. This Third Amendment to the agreement will result in a net increase to the Basic Fees, and includes an increase to remove all scope associated with Buildings 8, 9, 10, 11, and 27; partial scope from Buildings 7 and 12; increase for performing an additional bidding phase; and credit for warranty phase for the reduction in scope.	\$ 37,597.00	0
3/19/2019	New Addition and Renovations to Building 12	P.002301	JJ-1	7-0	Yes	Yes	The purpose is to approve the recommendation to award the Construction Services Agreement, RFQ 19-091C, for James B. Pirtle Construction Company Inc., with a Lump Sum Pre-Construction Award Amount of \$131,000 and a Construction Manager's Fee that will be calculated at 5% of the cost of work.	\$ 131,000.00	0
4/23/2019	SMART Program Renovations	P.001683	J-1	5-0	Yes	Yes	The purpose is to approve the First Amendment to Construction Service Agreements Versions 1-3, Multiple Construction Managers for Construction Management at Risk (CMAR) Services, Multiple Projects, SMART Program Renovations. The purpose of the Amendment to these Construction Services Agreements is to insert language that requires Construction Management Firms to use e-Builder to manage their project(s). e-Builder is the District's (BCPS) adopted software platform for managing projects in the SMART Program. These Agreements were executed prior to having e-Builder language requirements included in them.	\$ -	0
6/25/2019	SMART Program Renovations	P.001684	J-1	7-0	Yes	Yes	The purpose is approving the Termination Without Cause of the Construction Services Agreement with Gilbane Building Company, Project No. P.001684, SMART Program Renovations, RFQ 16-194C.	\$ -	0
4/21/2020	SMART Program Renovations	P.001684	JJ-5	9-0	Yes	Yes	The purpose of approving the Second GMP Amendment to Construction Services Agreement with Pirtle Construction, Inc. in the amount of \$19,996,611 to complete the remaining SMART scope. The scope of work associated with this GMP is for fire alarm, fire sprinklers, safety/security upgrades, ADA renovations related to educational adequacy, re-roofing, electrical improvements, HVAC improvements, STEM Lab improvements. Scope to provide fire sprinklers to Buildings 1, 3, 4, 5, 6, 7, 8, 9, 10, 11, and 12 was reviewed by the Task Assigned District's Chief Fire Official who determined that Buildings 1, 4, and 10 were the only buildings that required fire sprinklers. Buildings 2, 5, 6, 7, 8, 9, 11, and 12 did not require fire sprinklers, therefore, this scope of work was removed from the construction documents prior to bidding.	\$ 19,996,611.00	0
8/19/2020	SMART Program Renovations	P.001684	JJ-18	8-0	Yes	Yes	The purpose of the Fourth Amendment in the amount of \$364,722.26 to the Professional Services Agreement with ACAI Associates, Inc. is for Project No. P.001684, SMART Program Renovations, RFQ 16-166C. This Fourth Amendment to the agreement will result in a net increase to the Basic Fees, and includes an increase associated with changes to Fire Sprinklers and Stormwater Drainage; increase associated with repairs to storm damaged roof soffit; and increase for Contract Administration Fees for Scope Revision.	\$ 364,722.26	0
4/20/2021	SMART Program Renovations	P.001684	JJ-22	9-0	Yes	Yes	The purpose of Change Order #1 is adding the amount of \$19,621 with no change in contract duration - Pirtle Construction Company, Oakland Park, SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 19,621.00	0
5/18/2021	SMART Program Renovations	P.001684	JJ-1	9-0	Yes	Yes	The purpose of Change Order #2 is adding the amount of \$16,066 with no change in contract duration - Pirtle Construction, Inc., Oakland Park, SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 16,066.00	0
6/15/2021	SMART Program Renovations	P.001684	JJ-21	8-1	Yes	Yes	The purpose of Change Order #3 is adding the amount of \$7,898 with no change in contract duration - Pirtle Construction, Inc., Oakland Park, SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 7,898.00	0
7/20/2021	SMART Program Renovations	P.001684	JJ-1	7-0	Yes	Yes	The purpose approving Change Orders for a combined sum of \$364,600 for Multiple Projects, including Northeast HS (P.001684).	\$ 9,213.00	0
1/11/2022	SMART Program Renovations	P.001684	JJ-7	9-0	No	Yes	The purpose of Change Order #5 is adding the amount of \$16,501 with no change in contract duration - Pirtle Construction, Inc., SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 16,501.00	0
3/15/2022	SMART Program Renovations	P.001684	JJ-14	8-0	No	Yes	The purpose of Change Order #6 is adding the amount of \$7,383 with no change in contract duration - Pirtle Construction, Inc., SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 7,383.00	0
3/15/2022	New Addition and Renovations to Building 12	P.002301	JJ-22	8-0	Yes	Yes	The purpose of approving the First GMP Amendment to the Construction Services Agreement with Pirtle Construction, Inc. is adding the amount of \$17,515,738, and approving additional funding of \$4,256,338 from Capital Projects Reserve. The scope of work associated with this GMP includes a one-story flex lab building, a two-story 24-classroom new addition, A/C in P.E. locker rooms in Building 7, and renovation of Building 12 which includes a new football locker room, three general classrooms, and support space(s). It also includes demolition of Buildings 8, 9, 10, 11, and 27 and site restoration.	\$ 17,515,738.00	0

## Appendix C2 - Board Actions Timeline

### Northeast High School

Regular School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
5/17/2022	SMART Program Renovations	P.001684	JJ-12	6-0	Yes	Yes	The purpose of approving Change Order #7 is adding the amount of \$18,952, with no change in contract duration - Pirtle Construction, Inc., SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 18,952.00	0
6/14/2022	SMART Program Renovations	P.001684	JJ-11	6-0	No	Yes	The purpose of approving Change Order #8 is adding the amount of \$35,361 with no change to the contract duration - Pirtle Construction, Inc., SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 35,361.00	0
6/14/2022	SMART Program Renovations	P.001684	J-1	N/A	No	Yes	The purpose of the Fifth Amendment is to approve updates to the Form 02150g with the Professional Services Agreement with ACAI Associates, Inc. for Project No. P.001684, SMART Program Renovations, RFQ 16-166C. There is no impact to the project budget.	\$ -	0
7/19/2022	SMART Program Renovations	P.001684	JJ-9	8-0	No	Yes	The purpose of approving Change Order #9 is adding the amount of \$45,273 with no change to the contract duration - Pirtle Construction, Inc., SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 45,273.00	0
11/22/2022	New Addition and Renovations to Building 12	P.002301	JJ-6	8-0	Yes	Yes	The purpose of approving the First Amendment to the Professional Services Agreement with Zyscovich, LLC, dated November 9, 2022, in the amount of \$22,264, Northeast High School, Oakland Park, SMART Program Renovations, New Addition and Renovations to Building 12, Project No. P.002301. This First Amendment to the agreement will result in an increase to Basic Services fees to alternate feed to new Building 29 and water permit extension.	\$ 22,264.00	0
11/22/2022	SMART Program Renovations	P.001684	JJ-10	8-0	Yes	Yes	The purpose of approving the Sixth Amendment to the Professional Services Agreement with ACAI Associates, Inc., dated November 9, 2022, in the amount of \$75,722, Northeast High School, Oakland Park, SMART Program Renovations, Project No. P.001684, RFQ 16-166C. This Sixth Amendment to the agreement will result in a net increase to the Basic Fees, and includes an increase associated with Building 2, 4, and 5 structural evaluations; increase associated with Building 7 deteriorated roof joists; increase associated with Building 3 sanitary line; and increase associated with Building 6 walkways.	\$ 75,722.00	0
12/13/2022	SMART Program Renovations	P.001684	JJ-12	8-0	No	Yes	The purpose of approving Change Order #10 is adding the amount of \$67,540 with no change to the contract duration - Pirtle Construction, Inc., SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 67,540.00	0
2/15/2023	New Addition and Renovations to Building 12	P.002301	JJ-1	9-0	Yes	Yes	The purpose of Change Order #1 in the amount of \$65,937 and no change to the contract duration - Advanced Roofing Inc., Northeast High School, Fort Lauderdale, SMART Program Renovations, Project No. P.002301, RFQ 19-091C.	\$ 65,937.00	0
2/15/2023	SMART Program Renovations	P.001684	JJ-5	9-0	Yes	Yes	The purpose of Change Order #11 in the amount \$50,360 and no change to the contract duration - James B. Pirtle Construction Inc., Northeast High School, Oakland Park, SMART Program Renovations, Project No. P.001684, RFQ 16-194C.	\$ 50,360.00	0
3/7/2023	New Addition and Renovations to Building 12	P.002301	J-1	9-0	Yes	Yes	The purpose of approving the grant of an FP&L Easement grant is for the new Classroom Building 24 at Northeast High (P.002301).	\$ -	0
5/9/2023	New Addition and Renovations to Building 12	P.002301	JJ-2	9-0	No	Yes	The purpose of Change Order No. #2 in the amount of \$68,452 for Northeast High School, Project No. P.002301, RFQ 19-091C.	\$ 68,452.00	0
5/9/2023	New Addition and Renovations to Building 12	P.002301	JJ-12	9-0	No	Yes	The purpose is to approve the Second Amendment to the Professional Services Agreement with Zyscovich, LLC, RFQ 19-077C, for \$8,793. This Second Amendment to the agreement will result in an increase to Basic Services fees to include additional faculty restroom.	\$ 8,793.00	0
6/13/2023	SMART Program Renovations	P.001684	JJ-4	7-0	No	Yes	The purpose of Change Order No. #12 and additional funding in the amount of \$35,827 for Northeast High School, Project No. P.001684, RFQ 16-194C.	\$ 35,827.00	0
8/8/2023	SMART Program Renovations	P.001684	JJ-15	9-0	No	Yes	The purpose of the Change Order #13 in the amount of \$6,607 for Northeast High School, Project No. P.001684, RFQ 16-194C.	\$ 6,607.00	0
9/12/2023	SMART Program Renovations	P.001684	JJ-13	8-0	Yes	Yes	The purpose of the Change Order #14 in the amount of \$1,653 and 285 days added to the contract duration for Northeast High School, Project No. P.001684, RFQ 16-194C.	\$ 1,653.00	285

## Appendix C2 - Board Actions Timeline Northeast High School

Operational School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
5/2/2017	SMART Program Renovations	P.001684	JJ-6	7-0	Yes	Yes	The purpose of approving the First Amendment to the Professional Services Agreement with ACAI Associates, Inc., RFQ 16-166C, dated August 16, 2016, is to increase Basic Services in the amount of \$30,300 to cover the acceleration of the design for Single Point of Entry (SPE), ADA Restrooms and Door Hardware Replacement Design, and the Planning/Programming Services for Swing Space.	\$ 30,300.00	0
11/7/2018	New Addition and Renovations to Building 12	P.002301	J-1	N/A	N/A	Yes	The purpose of the Authorization to Advertise for Construction Manager at Risk Services for Northeast High School, Approve RFQ Form, Authorize the Construction Manager at Risk (CMAR) Services Agreement, and RFQ 19-091C.	\$ -	0
Special School Board Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
6/28/2016	SMART Program Renovations	P.001684	7	5-0	Yes	Yes	The purpose is authorization to advertise RFQ 16-194C for Construction Manager at Risk Services for Northeast High School; approve the RFQ Form; and approval of the CMAR Standard Agreement Form and General Conditions. This project has been appropriated in the Adopted District Educational Facilities Plan (September 8, 2015) and in the District's Capital Budget. Total funds allocated for the scope included is \$14,547,000 and includes soft costs.	\$ -	0
9/26/2017	SMART Program Renovations	P.001684	JJ-14	9-0	Yes	Yes	The purpose is approving the First GMP Amendment to the Construction Services Agreement with Gilbane Building Company, SMART Program Renovations, Project No. P.001684. Funds for included in the Adopted District Educational Facilities Plan, Fiscal Years 2016-17 to 2020-21.	\$ -	0
7/31/2018	SMART Program Renovations	P.001684	2	9-0	Yes	No	The board voted to approve the scope for Construction Services Agreement with Pirtle Construction Company, Inc. for Northeast High School Option, Alternate #1, which includes the base recommendation, and to include air conditioning to both the boys' and girls' physical education locker rooms. A motion was made to amend, in which a Board member requested for an amendment that removed the air conditioning from the motion, which was ultimately rejected, requiring a new vote.	\$ -	0
7/31/2018	SMART Program Renovations	P.001684	2	6-3	Yes	Yes	The board approved the scope for Construction Services Agreement with Pirtle Construction Company, Inc. for Northeast High School Option, Alternate #1, which includes the base recommendation, and to include air conditioning to both the boys' and girls' physical education locker rooms, as well as adding a New Flex Lab.	\$ -	0
8/13/2019	SMART Program Renovations	P.001684	2	6-0	Yes	Yes	The purpose is approving the Construction Services Agreement with James B. Pirtle Company, SMART Program Renovations, Project No. P.001684.	\$ 105,000.00	0
School Board Workshop Minutes									
Meeting Date	Project Name	Project Number	Board Item #	Board Vote	Board Discussion?	Board Approval?	Executive Summary	Financial Impact (+/-)	Schedule Impact (+/- Days)
6/19/2018	SMART Program Renovations	P.001684	1H	N/A	Yes	N/A	<p>Staff presented four (4) potential campus options for Northeast High School to the Board. After the demolition of Buildings 10, 11, and 27, Option 1 would provide: 2 Art Classrooms, 5 Business Education/Computer Classrooms, 5 General Classrooms, 1 Teacher Planning Room, and restrooms; Option 2 would provide: 2 Art Classrooms, 5 Business Education/Computer Classrooms, 17 General Classrooms, 1 Teacher Planning Room, and restrooms; Option 3 would provide: 2 Art Classrooms, 5 Business Education/Computer Classrooms, 17 General Classrooms, 1 Teacher Planning Room, and restrooms, with an additional demolition of Building 9; Option 4 would proceed with original SMART Program Renovations, including ADA renovations, electrical improvements, HVAC improvements, re-roofing, safety/security upgrades, STEM Lab improvements, and weight room renovations.</p> <p>Following the Board's discussions, several members expressed a preference for "Option 3". This option proposed the demolition of Buildings 9, 10, 11, and 27, followed by site restoration and the construction of a new addition comprising 24 classrooms. The Board also suggested that the staff consider the demolition of Building 8, which houses the football locker room and the existing weight room.</p>	\$ -	0



## APPENDIX D

### *SMART PROGRAM SCHEDULE COMPARISON & PROGRAM YEAR ANALYSIS*





## APPENDIX D – SMART PROGRAM SCHEDULE COMPARISON & PROGRAM YEAR ANALYSIS

### Overview

Pursuant to the request made by an Audit Committee member during the January 11, 2024 Audit Committee meeting, Appendix D contains a listing of the original 236 projects included in Heery International’s (“Heery”) original baseline schedule. The listing compares the substantial completion dates shown in Heery’s original baseline schedule to subsequent re-baselined schedules issued by Heery and AECOM, and e-Builder schedule data. The listing also includes supplementary information, such as program year, school Title I status, project budgets, and current project phase. The full dataset can be found in Appendix D on page 89.

### Project Status by Program Year

The following table shows the total number of projects in each project phase, by “Program Year”, as of January 25, 2024.

Project Phase	Program Year <sup>1</sup>					Total	% of Total
	Program Year 1	Program Year 2	Program Year 3	Program Year 4	Program Year 5		
1-Planning	1	0	1	1	1	4	2%
4-Bid & Award	2	0	2	1	1	6	3%
5A-Construction	0	2	0	1	7	10	4%
5B-Construction	18	21	25	23	40	127	54%
6-Substantial Completion	4	10	4	3	6	27	11%
7-Final Completion	2	0	3	3	2	10	4%
8-Financial Closeout	1	0	3	1	1	6	3%
9-Closed	5	10	13	6	6	40	17%
N/A <sup>2</sup>	1	1	0	1	3	6	3%
<b>Total</b>	<b>34</b>	<b>44</b>	<b>51</b>	<b>40</b>	<b>67</b>	<b>236</b>	

*Note 1 “Program Year” represents the initial priority assigned to projects. For example, “Program Year 1” projects were the highest priority, and were funded in fiscal year 2015 following the approval of the Bond.*

*Note 2 Project data was not included in the “BOC Budget and Actuals Data” or “Substantial Completion – All Baselines” report utilized for analysis.*



## APPENDIX D – SMART PROGRAM SCHEDULE COMPARISON & PROGRAM YEAR ANALYSIS

### Project Status by Program Year (Continued)

The following table shows the total number of completed projects, by “Program Year”, as of January 25, 2024.

Program Year	Projects Completed <sup>1</sup>	Total # of Projects	% Complete
Program Year 1	12	34	35%
Program Year 2	20	44	45%
Program Year 3	23	51	45%
Program Year 4	13	40	33%
Program Year 5	15	67	22%
Total	83	236	

*Note 1 Includes projects in the “6-Substantial Completion” phase through “9-Closed” phase.*

Appendix D

Data Sources:

A	Data obtained from CBRE-Heery's "Milestone Schedule Baseline"
B	Data obtained from the "2023-2024 - Title I Schools" listing provided on the District's Title I, Migrant & Special Programs website
C	Data obtained from the "BOC Budget and Actuals Data" report in e-Builder (as of January 25, 2024)
D	Data obtained from the "Substantial Completion - All Baselines" report in e-Builder (as of November 2023)

Notes Legend

Note 1	According to the CPCM, the substantial completion milestone was presented in quarter/year format within CBRE-Heery's June 2017 schedule. The date shown in the matrix above is the last date of the quarter.
Note 2	Project was not included in the "BOC Budget and Actuals Data" or "Substantial Completion - All Baselines" report.

A					B	C			D					
										Heery Baseline Substantial Completion Date (June 2017)	Heery Re-baseline Substantial Completion Date (November 2018)	AECOM Re-baseline Substantial Completion Date (December 2020)	Substantial Completion Date in e-Builder ("eB")	Delta (Days) 2017 Substantial Completion to e-B Date
Index	Project Name	District	Program Year	Project #	Title I Status	Total Budget	Actuals Approved	Project Phase						
1	Annabel Perry Pre K-8	1	2	P.001728	N/A	\$ 4,925,674	\$ 4,874,923	9-Closed		3/31/2019	9/17/2019	9/17/2020	9/17/2020	536
2	Apollo MS	1	5	P.002110	Title I	\$ 8,172,777	\$ 3,527,168	SB-Construction		12/31/2020	3/9/2022	5/20/2025	3/22/2025	1542
3	Atlantic Tech College Arthur Ashe (Cont Serv Designer)	7	1	P.001959	N/A	\$ 3,172,267	\$ 3,081,626	6-Substantial Completion		9/30/2019	8/11/2019	5/31/2021	8/1/2023	1401
4	Atlantic Technical HS & Technical College	7	2	P.000415	N/A	\$ 22,599,240	\$ 3,086,356	SB-Construction		12/31/2019	8/26/2021	3/28/2025	10/30/2026	2495
5	Atlantic West ES	7	2	P.001796	Title I	\$ 924,900	\$ 591,253	5A-Construction		3/30/2019	3/18/2021	11/7/2024	11/14/2025	2421
6	Attucks MS Phase 1	1	2	P.001686	Title I	\$ 4,312,008	\$ 3,481,040	SB-Construction		6/30/2019	2/4/2021	2/24/2023	12/31/2023	1645
7	Attucks MS Phase 2 (Cont Serv Designer)	7	1	P.001633	Title I	\$ 996,048	\$ 894,623	8-Financial Closeout		6/30/2019	5/1/2020	7/9/2025	2/27/2023	1338
8	Bair MS	5	4	P.002044	Title I	\$ 1,309,843	\$ 1,144,916	SB-Construction		6/30/2020	2/24/2021	10/10/2022	12/1/2023	1249
9	Banyan ES (Cont Serv Designer)	5	1	P.001944	Title I	\$ 2,271,510	\$ 1,775,832	SB-Construction		6/30/2019	8/16/2019	7/22/2022	3/31/2024	1736
10	Bayview ES (Cont Serv Designer)	3	3	P.001786	N/A	\$ 2,556,281	\$ 2,556,281	9-Closed		9/30/2019	4/23/2019	4/30/2021	12/8/2021	800
11	Bennett ES	3	5	P.002085	Title I	\$ 1,269,521	\$ 320,301	1-Planning		3/31/2021	5/11/2021	9/3/2025	10/7/2027	2381
12	Blanche Ely Senior HS (CMAR Delivery)	7	1	P.001646	N/A	\$ 21,735,436	\$ 20,578,024	SB-Construction		3/31/2019	8/1/2020	6/9/2022	12/1/2023	1706
13	Boulevard Heights ES	1	4	P.002065	Title I	\$ 6,055,165	\$ 5,806,019	6-Substantial Completion		6/30/2020	4/28/2021	9/19/2025	7/17/2023	1112
14	Boyd H. Anderson HS	5	3	P.001846	N/A	\$ 10,592,103	\$ 6,904,769	SB-Construction		9/30/2019	5/21/2021	12/22/2023	5/31/2024	1705
15	Bright Horizons Center (Cont Serv Designer)	7	4	P.001974	N/A	\$ 3,840,295	\$ 3,774,753	6-Substantial Completion		6/30/2019	10/10/2020	3/4/2022	9/13/2022	1171
16	Broadview ES	4	1	P.001638	Title I	\$ 5,475,130	\$ 4,350,499	SB-Construction		6/30/2020	1/3/2021	7/28/2023	3/30/2024	1369
17	Broward Estates ES	5	4	P.002037	Title I	\$ 6,752,168	\$ 726,630	1-Planning		3/30/2020	2/10/2021	8/18/2023	2/3/2025	1771
18	C. Robert Markham ES (CMAR Delivery)	7	3	P.001920	N/A	\$ 7,913,830	\$ 5,821,082	SB-Construction		3/30/2020	9/3/2021	10/27/2023	1/21/2023	1341
19	Castle Hill ES (Cont Serv Designer)	5	3	P.001661	Title I	\$ 3,778,091	\$ 3,470,317	SB-Construction		6/30/2019	5/19/2019	7/9/2021	12/31/2023	1645
20	Central Park Elementary School	6	2	P.001757	N/A	\$ 7,977,539	\$ 6,743,897	SB-Construction		3/30/2019	10/11/2020	2/3/2023	8/31/2024	1981
21	Challenger ES	4	4	P.002040	Title I	\$ 3,555,100	\$ 3,209,287	SB-Construction		3/30/2020	2/24/2021	12/15/2022	12/15/2023	1355
22	Chapel Trail ES (Cont Serv Designer)	2	2	P.001732	N/A	\$ 4,538,436	\$ 4,309,692	6-Substantial Completion		3/30/2019	9/3/2020	4/6/2022	5/2/2023	1494
23	Charles Drew ES	7	3	P.001818	N/A	\$ 1,339,000	\$ 764,573	4-Bid & Award		9/30/2019	1/25/2021	5/24/2024	9/12/2025	2174
24	Charles Drew Family RC	7	3	P.001848	N/A	\$ 4,622,000	\$ 3,235,025	SB-Construction		9/30/2019	2/7/2021	7/19/2024	1/5/2025	1924
25	Charles W. Flanagan HS (CMAR Delivery)	2	3	P.001847	N/A	\$ 15,326,361	\$ 14,184,265	6-Substantial Completion		12/31/2019	10/26/2019	1/3/2020	1/3/2020	3
26	Coconut Creek ES (Re-Bid)	7	1	P.001413	Title I	\$ 4,912,446	\$ 4,912,446	9-Closed		9/30/2018	3/22/2019	2/28/2020	2/28/2020	516
27	Coconut Creek HS	7	2	P.001753	N/A	\$ 5,857,350	\$ 6,331,446	SB-Construction		6/30/2019	7/16/2021	10/27/2023	1/9/2024	1654
28	Coconut Palm ES (Cont Serv CMAR)	2	5	P.002088	Title I	\$ 2,700,300	\$ 2,408,745	SB-Construction		6/30/2020	4/9/2021	8/27/2025	12/31/2023	1279
29	Colbert Museum Magnet (FKA Colbert ES)(Cont Serv Designer)	1	3	P.001937	Title I	\$ 1,506,211	\$ 1,506,211	9-Closed		6/30/2019	3/16/2020	10/22/2021	12/13/2021	897
30	Collins ES (Cont Serv Designer/CMAR)	1	4	P.001659	Title I	\$ 2,822,301	\$ 2,117,433	SB-Construction		9/30/2019	12/18/2020	7/28/2023	9/1/2024	1798
31	Cooper City ES SMART Program Renovations	6	5	P.002150	Title I	\$ 1,177,238	\$ 1,071,466	SB-Construction		9/30/2020	4/3/2021	2/17/2023	12/1/2023	1157
32	Cooper City HS (CMAR Delivery)	6	5	P.002133	N/A	\$ 11,960,000	\$ 1,920,782	SB-Construction		6/30/2021	5/21/2022	1/23/2025	5/14/2025	1414
33	Coral Cove ES (Test & Balance)	2	4	P.002122	Title I	\$ 34,296	\$ 34,296	9-Closed		3/30/2020	7/1/2019	7/1/2019	7/1/2019	(273)
34	Coral Glades HS	4	5	P.002080	N/A	\$ 6,752,775	\$ 6,295,324	7-Final Completion		9/30/2020	12/12/2021	8/15/2025	5/2/2023	944
35	Coral Park ES	4	3	P.002045	Title I	\$ 1,332,450	\$ 1,189,770	9-Closed		3/30/2020	6/3/2021	12/2/2022	7/13/2022	835
36	Coral Springs HS	4	2	P.001765	N/A	\$ 14,927,899	\$ 13,041,834	SB-Construction		12/31/2019	11/16/2021	5/13/2024	8/1/2024	1675
37	Coral Springs MS	4	4	P.001979	Title I	\$ 19,426,965	\$ 9,347,559	SB-Construction		3/30/2021	11/12/2021	10/31/2025	10/6/2025	1651
38	Coral Springs Pre K-8 Phase 2	4	5	P.001982	Title I	\$ 6,149,340	\$ 2,329,186	SB-Construction		9/30/2020	9/17/2021	5/2/2025	8/12/2025	1777
39	Country Hills ES	4	5	P.002063	N/A	\$ 5,777,500	\$ 5,165,262	SB-Construction		9/30/2020	1/30/2022	12/23/2024	9/1/2024	1432
40	Country Isles ES	6	3	P.002002	N/A	\$ 1,239,660	\$ 955,775	SB-Construction		3/30/2020	3/10/2021	5/27/2022	12/31/2023	1371
41	Creshaven ES SMART Program Renovations (CMAR Delivery)	7	5	P.001676	Title I	\$ 8,783,680	\$ 1,200,396	SB-Construction		12/30/2020	12/16/2022	2/27/2025	2/27/2025	1520
42	Croissant Park ES	3	5	P.002086	Title I	\$ 6,203,910	\$ 5,871,432	SB-Construction		9/30/2020	3/14/2022	5/28/2024	3/31/2024	1278
43	Cross Creek School	7	5	P.002081	N/A	\$ 1,921,500	\$ 1,759,265	SB-Construction		9/30/2020	3/2/2021	5/22/2023	1/24/2024	1211
44	Crystal Lake MS (Cont Serv CMAR)	7	5	P.000816	Title I	\$ 2,603,321	\$ 2,152,104	SB-Construction		9/30/2020	4/15/2021	4/9/2025	9/2/2024	1433
45	Cypress Bay HS (Ph 1-Renovations) (CMAR Delivery)	6	2	P.001774	N/A	\$ 32,614,358	\$ 31,486,029	6-Substantial Completion		6/30/2020	6/19/2020	10/6/2021	8/17/2021	413
46	Cypress Bay HS (Ph 2-Classroom Additions) (CMAR Delivery)	6	2	P.001774-2	N/A	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>		<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>
47	Cypress ES	3	1	P.001412	Title I	\$ 3,752,064	\$ 3,752,064	9-Closed		6/30/2018	3/28/2019	3/3/2020	3/3/2020	612
48	Cypress Run EC (Test & Balance)	7	3	P.002120	N/A	\$ 58,814	\$ 58,814	9-Closed		6/30/2019	1/14/2019	6/19/2019	6/19/2019	(11)
49	Dania ES	1	5	P.002061	Title I	\$ 3,474,000	\$ 503,519	5A-Construction		6/30/2020	3/7/2022	6/23/2025	9/1/2025	1889
50	Dave Thomas EC East	3	2	P.001972	N/A	\$ 2,619,494	\$ 1,642,040	SB-Construction		12/31/2019	9/19/2020	1/27/2022	12/25/2023	1455
51	Davie ES	6	3	P.001899	Title I	\$ 5,096,700	\$ 4,778,269	8-Financial Closeout		12/31/2019	10/17/2020	3/9/2022	1/28/2022	759
52	Deerfield Beach ES	7	3	P.001820	Title I	\$ 5,611,445	\$ 3,179,933	SB-Construction		12/31/2019	10/30/2020	9/13/2023	12/13/2023	1443
53	Deerfield Beach HS Phase 1	7	1	P.001694	N/A	\$ 7,359,400	\$ 5,322,451	SB-Construction		3/31/2019	12/8/2020	6/22/2023	1/29/2024	1765
54	Deerfield Beach HS Phase 2 (CMAR Delivery)	7	5	P.002134	N/A	\$ 7,054,980	\$ 1,579,357	SB-Construction		12/31/2020	9/8/2022	2/5/2025	12/25/2024	1455
55	Deerfield Beach MS (CMAR Delivery)	7	5	P.002142	Title I	\$ 5,755,000	\$ 1,087,017	5A-Construction		12/31/2020	12/17/2022	8/1/2025	9/1/2025	1705
56	Deerfield Park ES	7	4	P.002036	Title I	\$ 6,224,840	\$ 4,021,793	SB-Construction		9/30/2020	9/28/2020	12/28/2022	12/31/2023	1187
57	Dillard 6-12 School	5	1	P.001726	Title I	\$ 8,481,232	\$ 4,614,719	SB-Construction		3/30/2019	1/8/2021	1/20/2023	12/26/2023	1732

Appendix D

- Data Sources:**
- A** Data obtained from CBRE-Heery's "Milestone Schedule Baseline"
  - B** Data obtained from the "2023-2024 - Title I Schools" listing provided on the District's Title I, Migrant & Special Programs website
  - C** Data obtained from the "BOC Budget and Actuals Data" report in e-Builder (as of January 25, 2024)
  - D** Data obtained from the "Substantial Completion - All Baselines" report in e-Builder (as of November 2023)

Notes Legend	
Note 1	According to the CPCM, the substantial completion milestone was presented in quarter/year format within CBRE-Heery's June 2017 schedule. The date shown in the matrix above is the last date of the quarter.
Note 2	Project was not included in the "BOC Budget and Actuals Data" or "Substantial Completion - All Baselines" report.

A					B	C			D					
										Heery Baseline Substantial Completion Date (June 2017)	Heery Re-baseline Substantial Completion Date (November 2018)	AECOM Re-baseline Substantial Completion Date (December 2020)	Substantial Completion Date in e- Builder ("eB")	Delta (Days) 2017 Substantial Completion to e-B Date
Index	Project Name	District	Program Year	Project #	Title I Status	Total Budget	Actuals Approved	Project Phase						
58	Dillard ES	5	4	P.001915	Title I	\$ 4,093,371	\$ 2,448,311	5B-Construction		3/30/2020	2/12/2021	1/13/2023	3/24/2024	1455
59	Discovery ES (Test & Balance)	5	5	P.002118	Title I	\$ 54,680	\$ 54,680	9-Closed		9/30/2020	3/26/2019	3/27/2020	3/27/2020	(187)
60	Dr. MLK Jr. Montessori Academy (Cont Serv Designer)	5	2	P.001662	N/A	\$ 980,695	\$ 980,695	9-Closed		3/30/2019	6/28/2019	3/30/2020	3/30/2020	366
61	Driftwood ES	1	5	P.002064	Title I	\$ 3,855,000	\$ 551,592	5A-Construction		6/30/2020	5/10/2021	12/10/2024	8/31/2025	1888
62	Driftwood MS	1	2	P.001837	Title I	\$ 8,345,700	\$ 7,621,609	5B-Construction		12/31/2019	12/18/2020	9/21/2022	12/15/2023	1445
63	Eagle Point ES	6	1	P.001746	N/A	\$ 6,145,450	\$ 4,885,053	5B-Construction		3/30/2019	1/23/2021	1/3/2023	12/31/2024	2103
64	Eagle Ridge ES	4	2	P.001722	N/A	\$ 3,306,383	\$ 3,220,587	9-Closed		3/31/2019	3/31/2019	8/9/2021	3/29/2021	729
65	Embassy Creek ES	6	3	P.001897	N/A	\$ 4,864,700	\$ 4,402,733	6-Substantial Completion		12/31/2019	12/18/2020	12/3/2021	10/2/2023	1371
66	Endeavour Primary LC ES (Cont Serv CMAR)	5	5	P.002111	Title I	\$ 2,360,790	\$ 2,100,052	5B-Construction		6/30/2020	9/30/2020	12/21/2022	12/20/2023	1268
67	Everglades ES (Cont Serv Designer)	6	2	P.001948	N/A	\$ 2,344,500	\$ 2,265,068	6-Substantial Completion		6/30/2019	3/2/2020	7/2/2021	11/5/2021	859
68	Everglades HS	2	3	P.001985	N/A	\$ 5,948,885	\$ 5,948,885	9-Closed		3/31/2020	8/8/2021	2/26/2021	11/19/2020	233
69	Fairway ES	2	2	P.001785	Title I	\$ 7,510,900	\$ 7,311,217	6-Substantial Completion		3/31/2019	11/22/2020	7/28/2021	3/9/2023	1439
70	Falcon Cove MS (CMAR Delivery)	1	3	P.001902	N/A	\$ 23,450,425	\$ 22,129,187	5B-Construction		9/30/2020	8/10/2021	1/27/2022	12/31/2023	1187
71	Flamingo ES (Cont Serv Designer)	6	3	P.002135	N/A	\$ 2,160,000	\$ 1,780,144	5B-Construction		12/31/2019	12/7/2020	8/26/2022	12/1/2023	1431
72	Floranda ES	3	4	P.002001	Title I	\$ 2,838,840	\$ 2,753,120	7-Final Completion		3/31/2020	2/8/2021	11/18/2022	1/13/2023	1018
73	Forest Glen MS	4	3	P.001865	Title I	\$ 9,047,800	\$ 8,766,187	5B-Construction		3/31/2020	11/13/2020	4/29/2021	8/31/2024	1614
74	Forest Hills ES (Cont Serv Designer)	4	1	P.001926	Title I	\$ 1,538,827	\$ 1,369,414	9-Closed		6/30/2019	2/2/2019	8/13/2021	7/28/2021	759
75	Fort Lauderdale HS	3	3	P.001839	N/A	\$ 3,700,966	\$ 3,700,966	9-Closed		9/30/2019	9/29/2020	1/19/2022	8/2/2022	1037
76	Fox Trail ES	6	4	P.001973	Title I	\$ 1,273,281	\$ 1,273,281	9-Closed		12/31/2019	11/13/2020	11/3/2021	4/26/2021	482
77	Gator Run ES	6	3	P.001863	N/A	\$ 4,092,272	\$ 3,991,633	7-Final Completion		12/31/2019	6/15/2020	8/6/2021	1/18/2023	1114
78	Glades MS	2	3	P.001968	Title I	\$ 386,000	\$ 76,280	1-Planning		12/31/2019	8/29/2020	6/20/2025	4/12/2026	2294
79	Griffin ES	6	2	P.001745	N/A	\$ 4,126,208	\$ 3,897,863	5B-Construction		12/31/2018	10/29/2019	9/1/2021	12/1/2023	1796
80	Gulfstream Academy (FKA/Hallandale Adult)	1	2	P.001822	Title I	\$ 5,108,744	\$ 5,108,744	9-Closed		12/31/2019	12/11/2020	9/23/2021	7/2/2021	549
81	Gulfstream Academy (FKA/Hallandale ES)	1	5	P.002072	Title I	\$ 2,234,821	\$ 1,749,829	6-Substantial Completion		9/30/2020	2/5/2021	11/21/2022	5/2/2023	944
82	Gulfstream Early Childhood Center of Excellence (FKA Gulfstream MS)	1	2	P.002055	Title I	\$ 6,397,696	\$ 6,122,247	6-Substantial Completion		6/30/2020	4/28/2021	4/7/2023	10/6/2023	1193
83	Hallandale Magnet HS Ph 2	1	5	P.002115	N/A	\$ 8,013,731	\$ 6,378,929	5B-Construction		12/31/2020	2/26/2022	4/4/2025	1/1/2025	1462
84	Harbordale ES (Cont Serv CMAR)	3	5	P.002068	N/A	\$ 2,074,121	\$ 1,613,616	5B-Construction		9/30/2020	2/13/2021	11/9/2023	8/16/2024	1416
85	Hawkes Bluff ES	5	2	P.001784	N/A	\$ 6,852,890	\$ 6,558,797	6-Substantial Completion		3/31/2019	7/3/2020	8/4/2021	11/28/2023	1703
86	Henry D. Perry EC	1	4	P.001986	N/A	\$ 9,308,580	\$ 9,035,827	8-Financial Closeout		6/30/2020	5/24/2021	4/29/2024	4/11/2023	1015
87	Heron Heights ES SMART Program Renovations (CC-CMAR)	4	5	P.002147	N/A	\$ 805,195	\$ 608,966	7-Final Completion		9/30/2020	4/27/2021	9/22/2023	10/18/2023	1113
88	Hollywood Central ES	1	4	P.001983	Title I	\$ 8,658,350	\$ 8,500,209	7-Final Completion		3/31/2020	1/9/2021	10/3/2022	12/13/2022	987
89	Hollywood Hills ES	1	4	P.001845	Title I	\$ 6,982,224	\$ 1,256,169	5B-Construction		6/30/2020	10/27/2021	12/10/2024	9/1/2025	1889
90	Hollywood Hills HS (CMAR Delivery)	1	2	P.001806	N/A	\$ 22,215,351	\$ 21,496,633	6-Substantial Completion		12/31/2019	6/5/2021	8/16/2022	7/31/2023	1308
91	Hollywood Park ES	1	2	P.001788	Title I	\$ 6,965,250	\$ 6,478,483	6-Substantial Completion		3/31/2019	1/3/2021	5/25/2023	7/13/2023	1565
92	Horizon ES	5	4	P.002038	Title I	\$ 1,662,971	\$ 1,389,162	5B-Construction		3/31/2020	2/12/2021	10/6/2022	12/31/2023	1370
93	Indian Ridge MS	6	2	P.001748	N/A	\$ 5,829,717	\$ 5,829,717	9-Closed		12/31/2018	1/9/2019	3/20/2019	3/20/2019	79
94	Indian Trace ES	6	4	P.001980	N/A	\$ 10,252,100	\$ 6,210,040	5B-Construction		6/30/2020	9/9/2021	9/12/2025	10/1/2024	1554
95	J.P. Taravella HS (CMAR Delivery)	4	4	P.001942	N/A	\$ 15,699,000	\$ 14,200,878	5B-Construction		6/30/2020	9/25/2021	8/22/2023	12/31/2023	1279
96	James S. Hunt ES	4	5	P.002059	N/A	\$ 9,303,620	\$ 7,767,432	5B-Construction		9/30/2020	3/14/2022	4/28/2025	7/11/2024	1380
97	James S. Rickards MS	3	2	P.001743	N/A	\$ 10,402,487	\$ 8,736,520	9-Closed		6/30/2019	1/9/2021	8/26/2022	8/24/2022	1151
98	Lake Forest ES (Cont Serv Designer)	1	3	P.001886	Title I	\$ 3,171,161	\$ 3,048,003	6-Substantial Completion		3/31/2019	5/5/2020	2/25/2022	4/29/2022	1125
99	Lakeside ES	2	5	P.002070	Title I	\$ 4,284,240	\$ 3,314,028	5B-Construction		6/30/2020	3/24/2021	11/25/2022	12/1/2023	1249
100	Larkdale ES (Cont Serv CMAR)	5	5	P.002073	Title I	\$ 2,690,350	\$ 2,481,258	6-Substantial Completion		9/30/2020	3/1/2021	6/24/2022	9/27/2023	1092
101	Lauderdale Lakes MS	5	1	P.001637	Title I	\$ 7,421,670	\$ 7,120,829	5B-Construction		12/31/2018	7/10/2019	8/27/2021	12/1/2023	1796
102	Lauderdale Manors ELC	5	1	P.001635	N/A	\$ 5,356,000	\$ 1,069,952	4-Bid & Award		3/31/2019	4/30/2020	12/1/2023	10/16/2025	2391
103	Lauderhill 6-12 STEM-MED Magnet School	5	2	P.001801	Title I	\$ 1,474,500	\$ 1,167,786	5A-Construction		9/30/2019	1/3/2021	2/28/2024	7/5/2025	2105
104	Lauderhill Comm School at Park Lakes (Cont Serv CMAR)	5	5	P.002092	N/A	\$ 1,787,500	\$ 1,128,259	5B-Construction		6/30/2020	4/23/2021	3/15/2023	2/1/2024	1311
105	Lauderhill-Paul Turner ES	5	5	P.002066	Title I	\$ 4,198,797	\$ 3,611,997	6-Substantial Completion		6/30/2020	6/28/2021	11/28/2023	10/27/2023	1214
106	Liberty ES	7	4	P.001999	Title I	\$ 404,416	\$ 404,416	9-Closed		3/31/2020	2/5/2021	12/17/2020	12/17/2020	261
107	Lloyd Estates ES	3	2	P.001824	Title I	\$ 6,408,047	\$ 4,940,422	5B-Construction		3/31/2019	2/20/2021	1/26/2024	2/1/2025	2134
108	Lyons Creek MS SMART Program Renovations (CMAR Delivery)	7	5	P.002141	Title I	\$ 2,174,000	\$ 856,296	5A-Construction		12/31/2020	9/4/2022	8/6/2025	7/14/2024	1291
109	Manatee Bay ES	6	1	P.001759	N/A	\$ 2,322,208	\$ 2,322,208	9-Closed		12/31/2018	11/2/2018	11/2/2018	11/2/2018	(59)
110	Maplewood ES Media Center	4	4	P.001998	Title I	\$ 362,000	\$ 287,990	6-Substantial Completion		3/31/2020	2/24/2021	8/2/2021	4/1/2022	731
111	Maplewood ES	4	1	P.001639	Title I	\$ 4,627,616	\$ 4,520,778	5B-Construction		6/30/2019	11/8/2020	9/16/2022	2/29/2024	1705
112	Margate ES Phase 1	7	1	P.001647	Title I	\$ 3,391,491	\$ 3,008,145	6-Substantial Completion		6/30/2019	11/21/2021	12/21/2021	12/1/2023	1615
113	Margate ES Phase 2	7	1	P.001647-NCA	Title I	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>
114	Margate MS	7	3	P.001836	Title I	\$ 5,240,309	\$ 1,883,168	4-Bid & Award		3/31/2020	12/10/2020	12/13/2024	8/14/2025	1962

Appendix D

- Data Sources:**
- A** Data obtained from CBRE-Heery's "Milestone Schedule Baseline"
  - B** Data obtained from the "2023-2024 - Title I Schools" listing provided on the District's Title I, Migrant & Special Programs website
  - C** Data obtained from the "BOC Budget and Actuals Data" report in e-Builder (as of January 25, 2024)
  - D** Data obtained from the "Substantial Completion - All Baselines" report in e-Builder (as of November 2023)

Notes Legend	
Note 1	According to the CPCM, the substantial completion milestone was presented in quarter/year format within CBRE-Heery's June 2017 schedule. The date shown in the matrix above is the last date of the quarter.
Note 2	Project was not included in the "BOC Budget and Actuals Data" or "Substantial Completion - All Baselines" report.

A					B	C			D					
									Heery Baseline Substantial Completion Date (June 2017)	Heery Re-baseline Substantial Completion Date (November 2018)	AECOM Re-baseline Substantial Completion Date (December 2020)	Substantial Completion Date in e- Builder ("eB")	Delta (Days) 2017 Substantial Completion to e-B Date	
Index	Project Name	District	Program Year	Project #	Title   Status	Total Budget	Actuals Approved	Project Phase						
115	Marjory Stoneman Douglas HS (CMAR Delivery)	4	5	P.000817	N/A	\$ 21,514,605	\$ 2,489,449	5A-Construction	6/30/2021	4/15/2022	12/31/2024	12/30/2025	1644	
116	Marjory Stoneman Douglas HS Bldg 12 (CMAR Delivery)	4	5	Note 2	N/A			Note 2	Note 2	Note 2	Note 2	Note 2	Note 2	
117	Mary M. Bethune MS	1	5	P.002125	N/A	Note 2	Note 2	Note 2	Note 2	Note 2	Note 2	Note 2	Note 2	
118	McArthur HS Phase 1 (CMAR Delivery)	1	4	P.001954	N/A	\$ 16,854,919	2,965,068	5A-Construction	12/31/2020	7/17/2022	12/23/2024	12/9/2025	1804	
119	McArthur HS Phase 2 (CMAR Delivery)	1	4	P.001954-NCA	N/A	Note 2	Note 2	Note 2	Note 2	Note 2	Note 2	Note 2	Note 2	
120	McNab ES (Cont Serv Designer)	3	3	P.001964	Title I	\$ 3,210,437	3,003,853	5B-Construction	6/30/2019	1/9/2020	7/30/2021	12/1/2023	1615	
121	McNicol Middle Magnet & STEM School (Cont Serv Designer)	1	2	P.001941	Title I	\$ 1,265,585	1,265,585	9-Closed	6/30/2019	2/10/2019	11/20/2019	11/20/2019	143	
122	Meadowbrook ES	3	5	P.002083	Title I	\$ 893,500	600,154	6-Substantial Completion	6/30/2020	4/9/2021	6/7/2022	6/15/2023	1080	
123	Millennium 6-12 Collegiate Academy (FKA Millennium MS)	4	4	P.002046	Title I	\$ 5,572,600	5,028,463	5B-Construction	6/30/2020	3/5/2021	1/2/2024	1/2/2024	1281	
124	Miramar ES	1	1	P.001727	Title I	\$ 5,920,758	5,920,758	9-Closed	3/31/2019	1/9/2020	11/20/2019	11/20/2019	234	
125	Miramar HS (CMAR Delivery)	2	4	P.002003	N/A	\$ 21,538,560	16,002,188	5B-Construction	12/31/2020	11/5/2021	7/19/2024	10/6/2024	1375	
126	Mirror Lake ES (Cont Serv Designer)	5	3	P.002011	Title I	\$ 3,833,400	3,658,863	7-Final Completion	6/30/2019	10/17/2020	11/17/2021	3/7/2023	1346	
127	Monarch HS SMART Program Renovations (CMAR Delivery)	7	5	P.002148	N/A	\$ 9,704,500	901,232	5B-Construction	12/31/2020	10/31/2022	11/6/2024	9/1/2025	1705	
128	Morrow ES (Cont Serv Designer)	4	1	P.001996	Title I	\$ 1,917,583	1,382,537	6-Substantial Completion	9/30/2019	2/3/2020	8/6/2020	11/6/2020	403	
129	New Renaissance MS SMART Program Renovations (CMAR Delivery)	2	5	P.002143	Title I	\$ 5,175,400	1,008,312	5A-Construction	12/31/2020	1/9/2023	8/6/2024	7/21/2025	1663	
130	New River Middle School	3	1	P.001710	Title I	\$ 4,324,600	2,699,143	5B-Construction	3/31/2019	9/3/2020	6/17/2022	6/30/2023	1552	
131	Nob Hill ES (Cont Serv CMAR)	6	5	P.002112	Title I	\$ 2,750,000	2,146,156	5B-Construction	9/30/2020	3/25/2021	9/29/2023	8/31/2024	1431	
132	Norcrest ES	7	3	P.001969	Title I	\$ 2,988,627	2,988,627	9-Closed	3/31/2020	11/13/2020	9/10/2021	6/24/2022	815	
133	North Andrews Gardens ES	3	5	P.001890	Title I	\$ 7,578,547	5,460,009	5B-Construction	6/30/2020	9/29/2021	10/23/2024	9/1/2025	1889	
134	North Fork ES (Cont Serv Designer)	5	1	P.001849	Title I	\$ 1,933,000	421,755	1-Planning	9/30/2019	3/31/2020	9/8/2023	11/20/2025	2243	
135	North Lauderdale Pre K-8 (Cont Serv Designer)	4	1	P.001903	Title I	\$ 781,069	364,735	4-Bid & Award	6/30/2019	7/16/2020	10/27/2023	6/19/2025	2181	
136	North Side ES (Cont Serv Designer)	3	3	P.001992	Title I	\$ 3,494,214	2,177,111	5B-Construction	6/30/2019	6/11/2020	8/23/2022	5/6/2024	1772	
137	Northeast HS (CMAR Delivery)	3	1	P.001684	N/A	\$ 24,686,831	\$ 20,289,576	5B-Construction	3/31/2019	8/22/2021	3/24/2023	12/5/2023	1710	
138	Northeast HS New Building (CMAR Delivery)	3	5	P.002301	N/A	\$ 21,988,750	20,374,126	5B-Construction	9/30/2021	11/19/2021	11/24/2023	12/1/2023	792	
139	Nova Blanche Forman ES SMART Program Renovations (CC-CMAR)	6	5	P.002149	Title I	\$ 3,633,055	1,828,374	5B-Construction	9/30/2020	5/6/2021	5/11/2023	12/25/2023	1181	
140	Nova Dwight D. Eisenhower ES SMART Program Renovations (CC-CMAR)	6	5	P.002145	Title I	\$ 3,010,016	2,096,060	5B-Construction	9/30/2020	4/23/2021	8/15/2025	7/7/2024	1376	
141	Nova HS (CMAR Delivery)	6	2	P.001817	N/A	\$ 31,368,665	27,961,504	5B-Construction	9/30/2019	8/1/2021	9/30/2022	12/1/2023	1523	
142	Nova MS	6	3	P.001898	Title I	\$ 3,977,171	2,500,345	5B-Construction	12/31/2019	11/7/2020	2/14/2025	7/13/2024	1656	
143	Oakland Park ES	3	3	P.001895	Title I	\$ 5,762,330	5,422,260	5B-Construction	12/31/2019	11/27/2020	1/13/2023	12/1/2023	1431	
144	Oakridge ES	1	1	P.001712	Title I	\$ 4,785,684	4,114,693	5B-Construction	3/31/2019	9/22/2020	3/27/2023	12/1/2023	1706	
145	Olsen MS	1	3	P.001955	Title I	\$ 11,054,315	10,127,681	5B-Construction	6/30/2020	5/23/2021	9/22/2023	1/10/2024	1289	
146	Oriole ES	5	4	P.001970	Title I	\$ 7,166,974	6,169,791	5B-Construction	3/31/2020	5/27/2021	3/11/2024	8/12/2024	1595	
147	Palm Cove ES (Cont Serv Designer)	2	3	P.001885	Title I	\$ 3,450,590	3,450,590	9-Closed	3/31/2019	8/30/2019	12/19/2019	12/19/2019	263	
148	Palmtree ES	7	5	P.002084	Title I	\$ 3,037,000	846,700	4-Bid & Award	9/30/2020	2/18/2022	8/1/2025	8/2/2025	1767	
149	Panther Run ES	2	5	P.002069	N/A	\$ 3,404,585	3,404,585	9-Closed	9/30/2020	11/29/2020	7/8/2022	7/6/2021	279	
150	Park Lakes ES	5	4	P.001988	Title I	\$ 732,377	731,926	9-Closed	3/31/2020	12/23/2020	8/12/2022	8/26/2021	513	
151	Park Ridge ES	7	5	P.001844	Title I	\$ 4,463,697	4,013,646	5B-Construction	6/30/2020	6/10/2021	9/14/2023	12/1/2023	1249	
152	Park Springs ES	4	5	P.002062	N/A	\$ 9,771,200	7,355,327	5B-Construction	9/30/2020	2/20/2022	9/5/2025	8/12/2024	1412	
153	Park Trails ES	4	5	P.002116	N/A	\$ 3,584,690	3,221,301	5B-Construction	9/30/2020	4/29/2021	2/27/2023	12/31/2023	1187	
154	Parkside ES	4	5	P.002082	Title I	\$ 2,505,175	1,940,610	6-Substantial Completion	6/30/2020	1/21/2021	8/25/2023	8/24/2023	1150	
155	Parkway MS	5	1	P.001807	Title I	\$ 4,888,330	4,389,557	6-Substantial Completion	3/31/2019	5/14/2021	3/27/2024	2/17/2023	1419	
156	Pasadena Lakes ES	1	1	P.001634	Title I	\$ 8,484,239	8,070,992	5B-Construction	3/31/2019	2/25/2021	6/29/2023	12/10/2023	1715	
157	Pembroke Lakes ES	2	3	P.001842	Title I	\$ 2,656,900	2,216,771	5B-Construction	9/30/2019	5/15/2021	6/29/2023	12/1/2023	1523	
158	Pembroke Pines ES	1	3	P.001864	Title I	\$ 5,084,000	4,836,998	5B-Construction	9/30/2019	4/30/2021	1/13/2023	12/1/2023	1523	
159	Peters ES	5	4	P.002041	Title I	\$ 10,693,200	4,189,861	5B-Construction	6/30/2020	7/28/2021	4/7/2025	7/16/2024	1477	
160	Pine Ridge EC (Test & Balance)	3	4	P.002121	N/A	\$ 52,343	52,343	9-Closed	6/30/2019	12/21/2018	7/1/2019	7/1/2019	1	
161	Pines Lakes ES	2	4	P.002004	Title I	\$ 1,725,000	1,519,521	7-Final Completion	3/31/2020	2/14/2021	11/27/2023	7/21/2023	1207	
162	Pines MS (Cont Serv CMAR)	2	5	P.002130	Title I	\$ 701,730	597,467	6-Substantial Completion	6/30/2020	2/23/2021	7/8/2022	4/11/2023	1015	
163	Pinewood ES (Cont Serv Designer)	4	3	P.001949	Title I	\$ 4,306,000	4,075,813	9-Closed	6/30/2019	6/12/2020	6/2/2021	7/22/2021	753	
164	Pioneer MS	6	3	P.001793	N/A	\$ 11,357,113	11,337,818	8-Financial Closeout	9/30/2019	5/3/2021	3/29/2021	11/3/2021	765	
165	Piper High School	5	1	P.001744	N/A	\$ 19,799,706	18,844,704	5B-Construction	9/30/2019	5/21/2022	2/24/2023	12/1/2023	1523	
166	Plantation ES (Test & Balance)	5	5	P.002119	Title I	\$ 49,910	49,910	9-Closed	6/30/2020	3/30/2019	5/1/2020	5/1/2020	(60)	
167	Plantation HS (CMAR Delivery)	5	4	P.001916	N/A	\$ 14,278,400	2,862,243	4-Bid & Award	3/31/2020	3/5/2022	12/26/2024	2/25/2026	2157	
168	Plantation MS	5	2	P.001729	Title I	\$ 2,011,300	1,653,384	5B-Construction	6/30/2019	6/9/2020	2/3/2023	9/1/2023	1524	
169	Plantation Park ES	6	5	P.002136	Title I	\$ 3,234,546	2,770,350	5B-Construction	9/30/2020	4/30/2021	5/8/2024	1/20/2024	1207	
170	Pompano Beach ES	7	2	P.001713	Title I	\$ 6,614,551	6,189,305	9-Closed	3/31/2019	4/12/2020	3/29/2021	11/28/2022	1338	
171	Pompano Beach HS	7	5	P.002091	N/A	\$ 3,244,960	1,485,273	5B-Construction	9/30/2020	7/7/2021	4/14/2025	8/2/2024	1402	

Appendix D

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Notes Legend	
Note 1	According to the CPCM, the substantial completion milestone was presented in quarter/year format within CBRE-Heery's June 2017 schedule. The date shown in the matrix above is the last date of the quarter.
Note 2	Project was not included in the "BOC Budget and Actuals Data" or "Substantial Completion - All Baselines" report.

	A				B		C			D				
										Heery Baseline Substantial Completion Date (June 2017)	Heery Re-baseline Substantial Completion Date (November 2018)	AECOM Re-baseline Substantial Completion Date (December 2020)	Substantial Completion Date in e- Builder ("eB")	Delta (Days) 2017 Substantial Completion to e-B Date
Index	Project Name	District	Program Year	Project #	Title I Status	Total Budget	Actuals Approved	Project Phase						
172	Pompano Beach MS	7	1	P.001721	Title I	\$ 12,946,976	\$ 12,516,123	SB-Construction		9/30/2019	8/10/2020	4/5/2022	3/31/2024	1644
173	Quiet Waters ES	2	2	P.001754	Title I	\$ 6,197,000	\$ 4,689,094	SB-Construction		6/30/2019	1/19/2020	10/15/2021	3/31/2024	1736
174	Ramblewood ES	4	2	P.001725	Title I	\$ 4,740,131	\$ 4,340,498	SB-Construction		6/30/2019	2/3/2020	10/8/2021	12/31/2023	1645
175	Ramblewood MS	4	3	P.001867	Title I	\$ 6,878,241	\$ 6,154,668	SB-Construction		12/31/2019	1/13/2021	6/20/2022	1/31/2024	1492
176	Riverglades ES	4	3	P.001866	N/A	\$ 3,118,177	\$ 2,645,286	SB-Construction		12/31/2019	10/30/2020	5/10/2022	12/1/2023	1431
177	Riverland ES	3	4	P.001987	Title I	\$ 4,057,192	\$ 3,773,658	SB-Construction		3/31/2020	11/13/2020	4/26/2022	12/5/2023	1344
178	Riverside ES	4	4	P.002039	N/A	\$ 2,224,500	\$ 1,935,358	SB-Construction		6/30/2020	6/3/2021	5/8/2024	5/8/2024	1499
179	Rock Island ES (Cont Serv Designer)	5	3	P.001950	Title I	\$ 2,306,944	\$ 2,065,332	7-Final Completion		6/30/2019	4/8/2020	5/13/2021	5/2/2022	1037
180	Royal Palm STEM Magnet (Ika Royal Palm ES)	5	3	P.001896	Title I	\$ 7,908,900	\$ 7,574,221	SB-Construction		12/31/2019	12/24/2020	2/1/2022	4/30/2024	1582
181	Sanders Park ES	7	5	P.002132	Title I	\$ 9,435,000	\$ 5,024,737	SB-Construction		12/31/2020	2/6/2022	10/16/2025	9/1/2025	1705
182	Sandpiper ES (Cont Serv Designer)	6	3	P.001924	Title I	\$ 1,024,942	\$ 899,119	SB-Construction		3/31/2019	9/6/2019	12/2/2021	1/31/2024	1767
183	Sawgrass ES	6	5	P.002127	Title I	\$ 4,777,117	\$ 3,538,898	SB-Construction		9/30/2020	7/28/2021	12/4/2024	9/1/2024	1432
184	Sawgrass Springs MS	6	3	P.001841	Title I	\$ 13,484,640	\$ 12,114,330	SB-Construction		12/31/2019	11/22/2020	3/6/2025	9/1/2024	1706
185	Sea Castle ES	2	2	P.001632	Title I	\$ 4,319,154	\$ 4,076,837	SB-Construction		3/31/2019	5/14/2020	12/15/2021	8/31/2024	1980
186	Seagull Alternative HS (Cont Serv Designer)	3	2	P.001951	N/A	\$ 2,455,082	\$ 1,836,401	SB-Construction		6/30/2019	4/14/2020	12/28/2021	12/23/2023	1637
187	Seminole MS	6	4	P.002047	Title I	\$ 6,312,380	\$ 2,724,193	SB-Construction		6/30/2020	1/2/2022	7/4/2025	9/1/2024	1524
188	Sheridan Hills ES	1	1	P.001636	Title I	\$ 7,087,680	\$ 6,074,384	SB-Construction		3/31/2019	3/26/2021	10/12/2023	8/31/2024	1980
189	Sheridan Park ES	1	5	P.002071	Title I	\$ 4,113,906	\$ 3,448,651	SB-Construction		6/30/2020	3/17/2021	12/27/2023	8/31/2024	1523
190	Sheridan Technical College (CMAR Delivery)	3	5	P.002060	N/A	\$ 3,770,000	\$ 1,829,967	5A-Construction		3/31/2021	9/17/2021	7/12/2024	12/1/2025	1706
191	Sheridan Technical HS (CMAR Delivery)	3	5	P.002128	N/A	\$ 4,944,000	\$ 783,991	SB-Construction		12/31/2020	5/2/2022	9/27/2024	11/29/2024	1429
192	Silver Lakes ES (Cont Serv Designer)	4	3	P.002009	Title I	\$ 2,252,382	\$ 2,252,382	9-Closed		9/30/2019	8/17/2019	9/30/2020	9/30/2020	366
193	Silver Lakes MS SMART Program Renovations (CMAR Delivery)	4	5	P.002144	Title I	\$ 1,020,000	\$ 582,686	SB-Construction		12/31/2020	9/25/2022	3/21/2025	12/1/2023	1065
194	Silver Palms ES SMART Program Renovations	2	5	P.002146	N/A	\$ 3,616,400	\$ 3,458,698	8-Financial Closeout		3/31/2021	3/28/2021	6/15/2023	3/29/2022	363
195	Silver Ridge ES	6	3	P.001984	N/A	\$ 2,922,122	\$ 2,922,122	9-Closed		3/31/2020	11/20/2020	7/30/2021	4/26/2021	391
196	Silver Shores ES (Cont Serv Designer)	2	3	P.001906	Title I	\$ 2,202,546	\$ 2,202,546	9-Closed		3/31/2019	12/5/2019	10/18/2019	10/18/2019	201
197	Silver Trail MS	2	1	P.001406	N/A	\$ 6,203,150	\$ 6,032,773	7-Final Completion		12/31/2018	9/20/2019	4/13/2021	6/30/2021	912
198	South Broward HS	1	3	P.001838	N/A	\$ 10,324,370	\$ 8,459,091	SB-Construction		12/31/2019	12/22/2020	9/1/2023	12/31/2024	1827
199	South Plantation HS	6	5	P.002090	N/A	\$ 7,875,714	\$ 6,017,397	SB-Construction		9/30/2020	2/15/2022	9/26/2025	10/17/2024	1478
200	Stephen Foster ES	3	5	P.002067	N/A	\$ 5,517,497	\$ 5,226,206	SB-Construction		6/30/2020	4/21/2021	9/29/2023	12/1/2023	1249
201	Stirling ES (Cont Serv Designer)	1	3	P.001905	Title I	\$ 4,376,295	\$ 3,245,707	SB-Construction		6/30/2019	7/30/2020	8/19/2022	12/31/2024	2011
202	Stranahan HS (CMAR Delivery)	3	1	P.001683	N/A	\$ 27,096,234	\$ 22,835,139	SB-Construction		3/31/2019	1/14/2021	3/18/2022	12/1/2023	1706
203	Stranahan HS Cafeteria (CMAR Delivery)	3	5	P.002163	N/A	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>		<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>	<i>Note 2</i>
204	Sunland Park Academy (Cont Serv Designer)	5	2	P.001939	Title I	\$ 1,421,955	\$ 1,421,955	9-Closed		3/31/2019	6/18/2020	10/29/2021	5/11/2022	1137
205	Sunrise MS	3	2	P.001819	Title I	\$ 6,656,050	\$ 6,417,299	6-Substantial Completion		9/30/2019	10/15/2020	1/7/2022	11/30/2022	1157
206	Sunset Lakes ES	2	3	P.001971	N/A	\$ 2,799,008	\$ 2,799,008	9-Closed		12/31/2019	3/26/2021	10/28/2020	10/6/2020	280
207	Sunshine ES	2	5	P.002079	Title I	\$ 3,948,448	\$ 3,307,000	SB-Construction		6/30/2020	7/1/2021	10/8/2025	12/16/2023	1264
208	Tamarac ES Media Center (Cont Serv Designer)	4	4	P.002049	Title I	\$ 75,795	\$ 75,791	9-Closed		3/31/2020	2/28/2020	6/18/2020	6/18/2020	79
209	Tamarac ES	4	1	P.001724	Title I	\$ 2,263,657	\$ 1,588,160	7-Final Completion		3/31/2019	2/17/2020	11/5/2021	7/18/2023	1570
210	Tedder ES	7	2	P.001808	Title I	\$ 4,215,616	\$ 3,506,279	SB-Construction		3/31/2019	3/18/2021	3/7/2023	12/31/2024	2102
211	Tequesta Trace MS	6	4	P.002042	N/A	\$ 10,376,160	\$ 8,729,192	SB-Construction		6/30/2020	1/26/2022	9/19/2025	9/24/2024	1547
212	The Quest Center (Cont Serv Designer)	1	3	P.001892	N/A	\$ 1,823,000	\$ 1,520,152	SB-Construction		3/31/2019	2/18/2020	5/9/2022	3/1/2024	1797
213	Thurgood Marshall ES	5	5	P.001674	N/A	\$ 4,426,433	\$ 4,227,806	SB-Construction		9/30/2020	12/27/2020	9/14/2023	12/1/2023	1157
214	Tradewinds ES	7	5	P.002129	Title I	\$ 3,718,910	\$ 3,718,910	9-Closed		9/30/2020	3/18/2021	8/26/2022	8/20/2021	324
215	Tropical ES (Cont Serv Designer)	6	2	P.001904	Title I	\$ 1,540,085	\$ 1,275,331	SB-Construction		6/30/2019	9/17/2020	8/18/2023	12/7/2023	1621
216	Village ES (Cont Serv Designer)	5	2	P.001952	Title I	\$ 1,336,189	\$ 1,046,924	SB-Construction		6/30/2019	11/27/2020	5/24/2023	12/31/2023	1645
217	Virginia Shuman Young ES	3	4	P.002000	N/A	\$ 4,628,230	\$ 3,264,533	SB-Construction		3/31/2020	4/14/2021	3/10/2023	8/1/2024	1584
218	Walker ES (Cont Serv Designer)	5	2	P.001938	Title I	\$ 3,450,542	\$ 2,899,775	SB-Construction		3/31/2019	3/16/2020	2/11/2022	1/31/2024	1767
219	Walter C. Young MS (CMAR Delivery)	2	3	P.002010	Title I	\$ 15,885,560	\$ 14,098,176	6-Substantial Completion		12/31/2020	11/12/2021	9/13/2024	8/29/2023	971
220	Watkins ES	1	5	P.002074	Title I	\$ 2,950,932	\$ 2,950,932	9-Closed		9/30/2020	10/26/2020	12/18/2023	10/14/2021	379
221	Welleby ES	5	5	P.002114	Title I	\$ 3,038,156	\$ 2,613,839	SB-Construction		9/30/2020	7/1/2021	3/21/2025	12/31/2023	1187
222	West Broward HS (Test & Balance)	2	5	P.002087	N/A	\$ 49,764	\$ 49,764	9-Closed		3/31/2020	4/17/2019	12/31/2020	6/30/2021	456
223	West Hollywood ES	1	2	P.001794	Title I	\$ 3,910,160	\$ 3,799,147	6-Substantial Completion		3/31/2019	3/8/2020	5/4/2021	6/15/2023	1537
224	Westchester ES	6	2	P.001823	Title I	\$ 3,101,398	\$ 2,900,741	SB-Construction		6/30/2019	11/22/2020	12/3/2021	1/31/2024	1676
225	Western HS	6	4	P.001967	N/A	\$ 4,569,560	\$ 1,164,352	SB-Construction		3/31/2020	4/30/2022	9/12/2025	9/1/2025	1980
226	Westglades MS	4	5	P.002131	N/A	\$ 4,407,040	\$ 3,734,787	SB-Construction		9/30/2020	2/13/2022	5/6/2024	12/1/2023	1157
227	Westpine MS	5	4	P.002043	Title I	\$ 4,615,500	\$ 3,816,698	SB-Construction		6/30/2020	8/11/2021	3/10/2023	12/31/2023	1279
228	Westwood Heights ES (Cont Serv Designer)	3	2	P.001993	Title I	\$ 3,925,189	\$ 3,925,189	9-Closed		6/30/2019	5/20/2020	8/5/2020	10/9/2020	467

# Appendix D

- Data Sources:**
- A** Data obtained from CBRE-Heery's "Milestone Schedule Baseline"
  - B** Data obtained from the "2023-2024 - Title I Schools" listing provided on the District's Title I, Migrant & Special Programs website
  - C** Data obtained from the "BOC Budget and Actuals Data" report in e-Builder (as of January 25, 2024)
  - D** Data obtained from the "Substantial Completion - All Baselines" report in e-Builder (as of November 2023)

Notes Legend	
Note 1	According to the CPCM, the substantial completion milestone was presented in quarter/year format within CBRE-Heery's June 2017 schedule. The date shown in the matrix above is the last date of the quarter.
Note 2	Project was not included in the "BOC Budget and Actuals Data" or "Substantial Completion - All Baselines" report.

A					B	C		D					
Index	Project Name	District	Program Year	Project #	Title I Status	Total Budget	Actuals Approved	Project Phase	Heery Baseline Substantial Completion Date (June 2017) <i>Note 1</i>	Heery Re-baseline Substantial Completion Date (November 2018)	AECOM Re-baseline Substantial Completion Date (December 2020)	Substantial Completion Date in e-Builder ("eB")	Delta (Days) 2017 Substantial Completion to e-B Date
229	Whiddon-Rogers Education Center	3	1	P.001711	N/A	\$ 10,903,680	\$ 7,731,210	5B-Construction	9/30/2019	2/24/2021	11/14/2023	8/2/2024	1768
230	Whispering Pines EC (Cont Serv CMAR)	2	5	P.002089	N/A	\$ 4,849,580	\$ 2,778,568	5B-Construction	9/30/2020	2/9/2021	5/5/2025	5/4/2025	1677
231	William E. Dandy MS	5	3	P.001900	N/A	\$ 7,218,550	\$ 6,402,793	5B-Construction	12/31/2019	4/21/2021	3/23/2023	8/10/2024	1684
232	William T. McFatter TC Broward Fire (Cont Serv Designer)	6	3	P.001965	N/A	\$ 614,512	\$ 572,998	8-Financial Closeout	6/30/2019	3/2/2020	3/28/2023	2/21/2023	1332
233	William T. McFatter Tech College & Tech HS	6	2	P.001658	N/A	\$ 9,111,585	\$ 5,560,666	5B-Construction	12/31/2019	4/29/2021	4/1/2024	4/1/2024	1553
234	Wilton Manors ES	3	4	P.001917	Title I	\$ 5,808,160	\$ 4,877,420	5B-Construction	12/31/2019	9/7/2021	8/18/2025	2/20/2025	1878
235	Wingate Oaks Center	5	1	P.001741	N/A	\$ 6,058,217	\$ 5,719,492	5B-Construction	3/31/2019	7/16/2020	6/9/2023	12/31/2023	1736
236	Winston Park ES	7	4	P.001981	Title I	\$ 2,344,600	\$ 1,988,854	5B-Construction	6/30/2020	6/10/2021	4/29/2022	12/31/2024	1645



## APPENDIX E

### *PM/OR RESPONSE TO OBSERVATION #3 AND RSM COMPARATIVE SCOPE ANALYSIS*



# Stranahan HS

4/10/2024

DRAFT RSM Internal Audit Report - Big 3 Project Analysis\_03.27.2024

STRANAHAN HS – Pages 21, 22 & 23 of report

- Clarifications to items highlighted and identified under “U” and “Y” (per page 22 of 95):

- **Site:**

- Electrical: U=\$157K

The Pole Lighting is Damaged - Work not executed. Lighting was determined to be in good condition and in compliance with Code.

- Roofing: N=\$149K

Manufacturer (Aluminum Solutions Group) concurs that existing Aluminum canopies are in good condition and should remain, and require only cleaning and unclogging of column drainage from organic debris.

No additional aluminum canopies matching the square footage descriptions of SBBC ID# 314504 and 314505 could be located on campus.

- **Bldg. 1:**

- Exterior: U=\$341K

- All windows were replaced. A total of 191 windows.

- Site: U=\$880K

- 15 KVA Exterior Transformer - 480V Primary / 120/208V Secondary - Per Deficiency Detail - This entry seems to be incorrect as far as quantity, description, and budget. There are no 150 15KVA exterior transformers for building 1. There are no exterior transformers for building 1.
  - 600A - 120/208V - Per Deficiency Detail. There is no switchgear in Building 1, however there is a 480V panelboard with a nameplate of 500A that seems to be in a good condition, there is also a 400A 208 panelboard that is also in good condition.
  - 20 Foot Metal Poles w/ 1000W High Pressure Sodium (?) Lamps - Per Deficiency Detail.
    - Work not executed. Lighting was determined to be in good condition and in compliance with the Code.

- **Bldg. 2:**

- Electrical: U=143K

- 120/208V - 225Amp 32 Circuits - Per Deficiency Detail
  - 277/480V - 400Amp 42 Circuits - Per Deficiency Detail.
- Note: Quantity and ratings listed are not accurate; however, AE recommends replacing all original panelboards since they are in a bad condition. These panelboards are manufactured by companies that are no longer in business or no longer produce panelboards similar to Federal Pacific & Frank Adam.
- Panel boards were replaced.

- **Bldg. 4:**

- Exterior: U=\$11K

- Bldg. 4: Windows were replaced.

- Interior: U=31K

- The HVAC Terminal Device Requires Replacement: 8 VAV boxes - per Deficiency listing.
  - There were no VAV boxes found in this facility.

- **Bldg. 5:**

- Exterior: U=\$13K

- The Aluminum Window is Damaged and Requires Replacement (84 SF)
  - 7 Openings - Per Deficiency Detail
  - 4 openings identified on site. 101E (1), 220 (2), 224 (1).
  - Based on small scope areas, damaged window glass and frames to be *repaired* on case by case basis, not replaced.

- **Bldg. 6:**

- Exterior: U=\$16K

- The Aluminum Window is Damaged and Requires Replacement (24 SF)
  - 2 Openings - Per Deficiency Detail
  - 5 Openings identified. 232 (3), 236 (2)
  - Based on small scope areas, damaged window glass and frames to be repaired on case by case basis, not replaced.

- The Aluminum Window is Damaged and Requires Replacement (64 SF)  
5 Openings - Per Deficiency Detail  
6 Openings identified. 246 (3), 252 (3)  
Based on small scope areas, damaged window glass and frames to be repaired on case by case basis, not replaced.
- The Aluminum Window is Damaged and Requires Replacement (18 SF)  
2 Openings - Per Deficiency Detail  
2 Openings identified. 230 (2)  
Based on small scope areas, damaged window glass and frames to be repaired on case by case basis, not replaced.

- **Bldg. 7:**

- Exterior: U<\$1K

- The Aluminum Window is Damaged and Requires Replacement (5 SF)  
"0" Openings - Per Deficiency Detail  
21 openings identified. 261 (3), 268 (3), 269 (1), 274 (4), 275 (4), 276 (3), 277 (3)  
Based on small scope areas, damaged window glass and frames to be repaired on case by case basis, not replaced.

- Other: U=\$225K

- Provide Renovation of Restrooms associated with Educational Adequacy Renovations.  
Room Design Code = 815/816  
Renovate men's and women's restroom fixture locations to accommodate new ADA stall in each facility. Replace all stall partitions.  
- Work completed.
- STEM Lab Requires Renovation based on condition of room(s)  
RM 263. Upgrade building electrical for computers. Remove existing chalk boards and patch / repaint walls.  
The final relocations of the STEM labs are as follows:  
Bldg. 6: Business Lab.  
Bldg. 20: Fabrication and Robotic Labs.  
Bldg. 23: Nursing Lab.

- **Bldg. 8:**

- Electrical: U=\$37K

- The Electrical Transformers / Panel Boards Require Replacement  
- 2 Panel boards were replaced.

- 2 Transformers were replaced.

- **Bldg. 11:**

Note: Bldg. 11 has been de-scoped – Replaced by the new Cafeteria under a separate Project.

- Roofing: U=\$10K

- Reroofing with New Decking Required (Broward CPS) - 770 SF  
Remove existing roof system. Install new fire resistant board layer and sloped insulation. Deck repair may be required. Install new built-up roofing and flashings. 770 Sq. Ft.

- **Bldg. 12:**

Note: Bldg. 12 has been de-scoped – Replaced by the new Cafeteria under a separate Project.

- Exterior: U=119K

- The Aluminum Window is damaged and requires Replacement. (800 SF)

- Roofing: U=\$224K

- Reroofing with New Decking Required (Broward CPS) - 17,850 SF  
Removal of existing roofing system (no exist. Insulation). Repair / infill deck as needed. Install new curb extensions and fall protection railings. Add new roof slope. Install new built-up roofing and flashings.

- **Bldg. 13:**

- Mechanical: U=\$24K

- 2 window AC units were replaced.

- **Bldg. 14:**

- Exterior: U=\$5K

- The Aluminum Window is damaged and requires Replacement. (32 SF)  
Based on small scope areas, damaged window glass and frames to be repaired on case by case basis, not replaced.

- **Bldg. 15:**

- Mechanical: U=\$42K

- A new Direct Digital Control System to be interfaced with the existing Andover Main Control Panel shall be provided.
  - A third air handling unit was not found at this facility.
  - The Athletic Director window AC unit shall be replaced with a new unit.
    - 2 transformers were removed and re-installed (code compliance)

- **Bldg. 16:**

Note: Work on Bldg. 16 was executed under a separate contract.

- Exterior: N=<\$1K

- The Aluminum Window is damaged and requires Replacement. (1 SF)  
Based on small scope areas, damaged window glass and frames to be repaired on case by case basis, not replaced.

- Mechanical: N=112K

- The Cast Iron Water Boiler Requires Replacement

- Roofing: N=\$9K

- Removal of existing roofing system (no exist. Insulation). Install new fall protection railings. Add new roof slope. Install new built-up roofing and flashings. 724 Sq. Ft.

- **Bldg. 17:**

Note: A Castaldi report was generated and submitted to “State” for review. The Bldg. might be demolished.

- Other: U=\$99K

- STEM Lab Requires Renovation Based on Condition of Room(s)  
Room Design Code = 201  
Scope relocated to Building 20, room 553. Demolish wall separating two classrooms, Demolish portion of northern wall and install new interiors storefront and double door. Add 24" stage and access ramp to front of room.

The final relocations of the STEM labs are as follows:

Bldg. 6: Business Lab.

Bldg. 20: Fabrication and Robotic Labs.  
Bldg. 23: Nursing Lab.

**Bldg. 20:**

➤ Fire and Security: N=\$9K

- Sprinkler installation for 1,040 SF of non-protected building area (per deficiency listing) including new alarm check valve with water gong; control valve with tamper switch, and flow switch including fire alarm interface. Projected cost includes connection to existing fire line and approximately 40 lineal feet of underground supply piping to serve Building 20.
  - The 1040 SF of non protected area within a 46,000 SF could not be identified. This work was not executed.

● **Bldg. 26:**

➤ Roofing: N=\$2K

- Existing roofing system (100 SF) less than 10yrs old. All leaks already repaired. Recommend no work scope for patching.

● **Bldg. 27:**

➤ Roofing: N=\$1K

- Existing area is canvas tent. A/E recommendation is to cover under separate scope related to food service upgrades.

---

End of Clarification per pg 22

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**RSM COMPARATIVE SCOPE ANALYSIS: (pg 23 of 95)****U**

The following table includes the deficiency items that may have been incorporated into the scope of work, but could not be validated through our review of project documentation, as of the date of this report.

<b><u>M.A.P.P.S Deficiency Description</u></b>	<b><u>M.A.P.P.S Category</u></b>	<b><u>Bldg. #</u></b>	<b><u>M.A.P.P.S Repair Cost</u></b>
1- The Exterior Dry Type Transformer Requires Replacement	Site	1	859,173
<ul style="list-style-type: none"> <li>15 KVA Exterior Transformer - 480V Primary / 120/208V Secondary - Per Deficiency Detail - This entry seems to be incorrect as far as quantity, description, and budget. There are no 150 15KVA exterior transformers for building 1. There are no exterior transformers for building 1. Exterior transformers" might refer to the 3 transformers located in the stand alone electrical rooms, FISH numbers 27, 28 &amp; 29. 2 of which are rated at 150KVA. We recommend replacing all 3 of them along with all equipment in the mentioned electrical rooms. <ul style="list-style-type: none"> <li>- All 3 transformers were replaced.</li> </ul> </li> </ul>			
2- The Aluminum Window Is Damaged And Requires Replacement	Exterior	1, 4-7, 12, 14	505,962
<ul style="list-style-type: none"> <li>Based on small scope areas, damaged window glass and frames to be <i>repaired</i> on case by case basis, not replaced. <ul style="list-style-type: none"> <li>- Bldg. 1: All windows were replaced. A total of 191 windows.</li> <li>- Bldg. 4: All windows were replaced by PPO.</li> <li>- Bldg. 12: deleted from scope.</li> </ul> </li> </ul>			
3- STEM lab requires renovation based on condition of room(s)	Other	7, 17	323,975
<ul style="list-style-type: none"> <li>Work completed</li> <li>The final relocations of the STEM labs are as follows: <ul style="list-style-type: none"> <li>Bldg. 6: Business Lab.</li> <li>Bldg. 20: Fabrication and Robotic Labs.</li> <li>Bldg. 23: Nursing Lab.</li> </ul> </li> </ul>			
4- Reroofing with new Decking Required (Broward CPS)	Roofing	11, 12	233,579
<ul style="list-style-type: none"> <li>Bldgs. 11 &amp; 12 have been de-scoped – Replaced by the new Cafeteria under a separate Project.</li> </ul>			

5- The Pole Lighting Is Damaged  
And Should Be Replaced

Electrical/  
Site

1

178,069

Work not executed. Lighting was determined to be in good condition and in compliance with the Code.

6- The Panelboard Requires Replacement

Electrical

2, 8

161,409

Bldg. 2:

- 120/208V - 225Amp 32 Circuits - Per Deficiency Detail
- 277/480V - 400Amp 42 Circuits - Per Deficiency Detail.

Note: Quantity and ratings listed are not accurate; however, AE recommends replacing all original panelboards since they are in a bad condition. These panelboards are manufactured by companies that are no longer in business or no longer produce panelboards similar to Federal Pacific & Frank Adam.

- Panel boards were replaced.

Bldg. 8:

- 3 Panelboards. Quantity is inaccurate, but compromised panelboards will be replaced.
  - 2 Panel boards were replaced.
  - 2 Transformers were replaced.

7- The Electrical Transformer Requires  
Replacement

Mechanical

15

41,150

- 2 transformers were removed and re-installed (code compliance)

8- The HVAC Terminal Device  
Requires Replacement

Interior

4

31,253

- VAV boxes were non-existent.

9- The Window AC Unit Component  
Requires Replacement

Mechanical

13

4,280

- 2 window AC units replaced.

\_\_\_\_\_End of section dealing with scope that could not be validated\_\_\_\_\_





The following table includes deficiency item(s) that did not appear to be included in the final scope of work.

<u><b>M.A.P.P.S Deficiency Description</b></u>	<u><b>M.A.P.P.S Category</b></u>	<u><b>Bldg. #</b></u>	<u><b>M.A.P.P.S Repair Cost</b></u>
1- Aluminum Covered Walkways Require Replacement	Roofing	Site Level	148,539
<ul style="list-style-type: none"> <li>Manufacturer (Aluminum Solutions Group) concurs that existing Aluminum canopies are in good condition and should remain, and require only cleaning and unclogging of column drainage from organic debris.</li> <li>No additional aluminum canopies matching the square footage descriptions of SBBC ID# 314504 and 314505 could be located on campus.</li> </ul>			
2- The Cast Iron Water Boiler Requires Replacement	Mechanical	16	111,830
<ul style="list-style-type: none"> <li>Work on Bldg. 16 was executed under a separate contract.</li> </ul>			
3- Reroofing with new Decking Required (Broward CPS)	Roofing	16, 26, 27	11,311
<ul style="list-style-type: none"> <li>Bldg. 6: work executed under separate contract.</li> <li>Bldg. 26: Existing roofing system (100 SF) less than 10yrs old. All leaks already repaired. Recommend no work scope for patching.</li> <li>Bldg. 27: Existing area is canvas tent. A/E recommendation is to cover it under separate scope related to food service upgrades.</li> </ul>			
4- Install Fire Sprinklers	Fire and Security	20	8,604
<ul style="list-style-type: none"> <li>Sprinkler installation for 1,040 SF of non-protected building area (per deficiency listing) including new alarm check valve with water gong; control valve with tamper switch, and flow switch including fire alarm interface. Projected cost includes connection to existing fire line and approximately 40 lineal feet of underground supply piping to serve Building 20. <ul style="list-style-type: none"> <li>The 1040 SF of non protected area within a 46,000 SF could not be identified. Work was not executed.</li> </ul> </li> </ul>			
5- Roof Equipment requires Cabling	Roofing	26	671
<ul style="list-style-type: none"> <li>Cabling was not executed.</li> </ul>			
6- The Aluminum window is damaged and require replacement.	Exterior	16	149
<ul style="list-style-type: none"> <li>Window was replaced.</li> </ul>			

END

Appendix E - PM/OR Response to Observation #3 and RSM Comparative Scope Analysis



Blanche Ely HS

“Big 3” Project Analysis Internal Audit Report Draft Issued: March 2024

RSM COMPARATIVE SCOPE ANALYSIS

Blanche Ely High School

The following table includes the deficiency items that may have been incorporated into the scope of work, but could not be validated through our review of project documentation, as of the date of this report.

U				
Index	M.A.P.P.S Deficiency Description	M.A.P.P.S Category	Building #	M.A.P.P.S Repair Cost
1	Provide renovation of restrooms associated with educational adequacy renovations	Other	1	160,107
2	The Aluminum Window Is Damaged And Requires Replacement	Exterior	18	108,493
3	The 4 X 6 Exhausts/Ventilators Require Replacement	Misc.	1, 2	27,474
4	The Metal Exterior Door Requires Replacement	Exterior	18	25,317
5	Catwalk Requires Repair/Replacement	Exterior	4	20,044
6	The Stucco Exterior Requires Repair	Structural	18	13,540
7	Air Compressor is Inoperable and Requires Replacement	Specialties	4	6,172
8	Roof Equipment requires Cabling	Roofing	14	350
Total				361,497

The following table includes deficiency item(s) that did not appear to be included in the final scope of work.

N				
Index	M.A.P.P.S Deficiency Description	M.A.P.P.S Category	Building #	M.A.P.P.S Repair Cost
1	The Air Handler HVAC Component Requires Replacement	Mechanical	10, 11, 21	128,245
2	The Wood Window Is Damaged And Requires Replacement	Exterior	10, 11	25,643
3	Install Fire Sprinklers	Fire and Security	10, 11	24,683
4	The Mechanical / HVAC Piping / System Is Beyond Its Useful Life	Mechanical	10, 11	21,010
5	Duct Heater Requires Replacement	Mechanical	10, 11, 21	15,457
6	The Aluminum Window Is Damaged And Requires Replacement	Exterior	21	14,482
7	The Exterior Requires Painting	Exterior	10, 11	13,314
8	Controls Are Inadequate And Should Be Replaced With DDC Controls	Mechanical	10, 11	12,068
9	Ductwork Requires Replacement	Mechanical	10, 11, 21	8,049
10	The Exterior Condenser Requires Replacement	Mechanical	21	5,798
11	Exhaust Fan Ventilation Requires Replacement	Mechanical	10, 11	4,216
12	Test And Balancing Required	Mechanical	10	1,986
13	Repair HVAC Piping	Mechanical	21	1,603
14	Duct Damper Requires Replacement	Mechanical	10	169
Total				276,723



23

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PMOR Response

Designer Validation report states restrooms are in compliance with ADA accesssibility and thereforethe design and renovations not performed.

Designer Validation report states damaged windows were previously repaired.

Designer Validation report states these 4x6 Exhaust/Ventilators do not exist

Designiner Validation report states only one of these 6 doors requirie replacement. A second door was added later in design and overall (2) were included in the permitted set of drawings.

Designer Validation/Schematic report states there was an ongoing project at the time related to this deficiency - Roof replacement and rooftop cooling tower relocation.

Building had stucco cracks repaired and the building was repainted

Designer Validation report states that this compressor serves the existing pneumatic control system which is proposed to be reomved and replaced therefore replacement is unnecessary.

The roof curb(s) of this equipment, Deficiency line item - "Make-up air should be increased, were replaced and cabling was included.

Designer Validation report states these Buildings are disconnected from all utilities and are unoccupiable. District had no plans to occupy in the future. No work performed

Designer Validation report states these Buildings are disconnected from all utilities and are unoccupiable. District had no plans to occupy in the future. No work performed

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# Northeast HS

## RSM COMPARATIVE SCOPE ANALYSIS

Northeast High School

Index	Deficiency Description	Category	Building #	Total Repair Cost
1	The Chemistry Lab Fume Hood(s) Require Replacement	Specialties	12	413,048

Sheet A-12-101 Floor Plan Key Note 13 states "Replace lab Fume Hoods as required. Refer to Mech Dwgs". Sheet M12-201 indicates all of the mechanical improvements made on the industrial lab (new ductwork, new RTU, new AHU, new Condensing Units), there is no clear indication that the actual fume hoods were replaced, it does seem like the exhaust fans for the fumes were replaced as indicated by the schedule on M.002.

13 REPLACE LAB FUME HOODS AS REQUIRED. REFER TO MECH DWGS

14 PROVIDE NEW OPENINGS FOR EXISTING DOOR. FILL IN EXISTING PORTION OF OPENING AS REQUIRED. REFER TO STRUCT DWGS.

1 R12-417

2 R12-417

3 R12-101

**RECEIVED**  
APR 18 2018  
BUILDING DEPARTMENT  
BCPS

**PERMITTED**  
JAN 23 2019  
BUILDING DEPARTMENT  
BCPS

**DOOR SCHEDULE - BLDG 12**

Door Number	Width	Height	Comments
SDS.1	7'-0"	7'-0"	CONTRACTOR TO PROVIDE/NOA
SDS.2	7'-0"	7'-0"	CONTRACTOR TO PROVIDE/NOA
SDS.3	10'-0"	7'-0"	CONTRACTOR TO PROVIDE/NOA
SDS.4	7'-0"	7'-0"	CONTRACTOR TO PROVIDE/NOA
SDS.5	7'-0"	7'-0"	CONTRACTOR TO PROVIDE/NOA

NOTES: SEE SHEET A-81 FOR FULL DOOR, WINDOW AND LOUVER SCHEDULE

**KEY PLAN**

700 NE 56th St, Oakland Park, FL 33334

**BUILDING #12 - FLOOR PLAN**

**SHEET TITLE**

**ACAI**  
associates, inc.  
architecture-engineering  
roofing-consulting  
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AAC001323-EB0004379-COC010780  
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ARCHITECT OF RECORD

**16-027 G01**

**PROJECT NUMBER**

**A12-101**

**SHEET NUMBER**

TO THE BEST OF MY KNOWLEDGE AND ABILITY THESE PLANS ARE COMPLETE AND COMPLY WITH THE APPLICABLE BUILDING CODES

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EF-12-2	EF-12-3	EF-12-4
INDUSTRIAL LAB	INDUSTRIAL LAB	INDUSTRIAL LAB
344	344	344
-	-	-
ROOF	ROOF	ROOF
UTILITY	UTILITY	UTILITY
6280	6280	6280
BELT	BELT	BELT
CENTRIFUGAL	CENTRIFUGAL	CENTRIFUGAL
1570	1570	1570
0.80	0.80	0.80
2.0	2.0	2.0
-	-	-
-	-	-
208/60/3	208/60/3	208/60/3
-	-	-
GREENHECK	GREENHECK	GREENHECK
USF-324-10	USF-324-10	USF-324-10
BI-20	BI-20	BI-20
YES	YES	YES

2	Aluminum Covered Walkways Require Replacement	Roofing	Site Level	105,908
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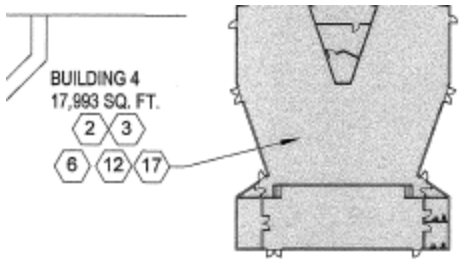
Multiple covered walkways are scheduled to be re-roofed as part of the project, no aluminum covered walkway is scheduled to be replaced as part of the project.

3	The Aluminum Storefront Exterior Door Requires Replacement	Exterior	4	50,006
---	--	----------	---	--------

There is no mention on the contract drawings for the exterior storefront replacement at building 4.

4	The Overhead Door Requires Replacement	Interior	4	43,435
---	--	----------	---	--------

New overhead door replacement was deemed not required on the permitted drawings. Sheet A-100 Note 17. Even though the door schedule does mention on A-601, Door tag 325.2 and 325.3 as a 10' x 9' rolling door but its shown to be doors for Building 12.

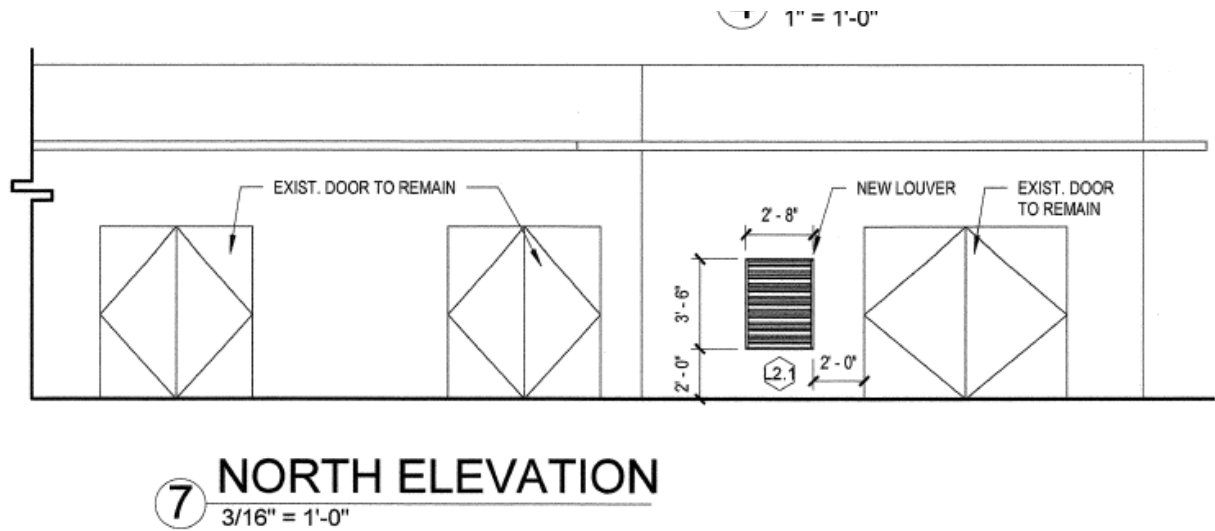


5	The Distribution Panel Requires Replacement	Electrical	2	43,112
---	---	------------	---	--------

Distribution panel was not fully replaced based on the original drawings, it was upgraded with the chiller replacement in order to meet the new chiller capacity.

6	The Metal Exterior Door Requires Replacement	Exterior	2	34,029
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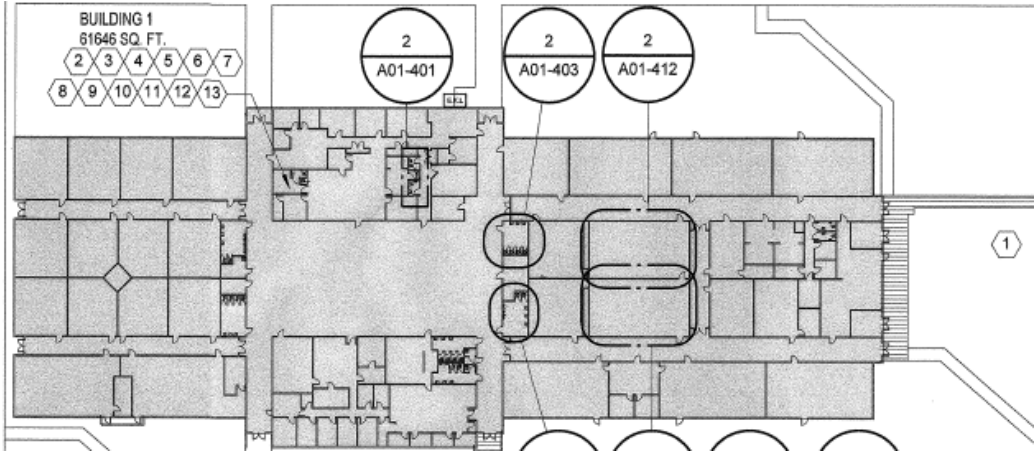
As part of the original plans doors on Building 2 are existing to remain per sheet A02-101. But ASI 2 & 4 both address the double doors on Bldg 2 with updated NOA which might have included these doors as part of the project.



7	Emergency Exit Signage Is Missing And Needed	Electrical	1	32,800
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Per sheet A-100 note 8. "Provide emergency exist signage as required. Refer to Elect. Dwgs". Building is included in Note 8.





8	Replace Variable Frequency Drive	Mechanical	Site Level	32,292
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Per the mechanical schedule on sheet M.001 & M.003 all of the new RTU and AHU are two receive a new VFD with the replacement as per the contract drawings.

CHILLED WATER AIR HANDLING UNIT SCHEDULE																			
AHU-1-1	AHU-1-2	AHU-1-3	AHU-1-4	AHU-1-5	AHU-1-6	AHU-1-7	AHU-1-8	AHU-4-1	AHU-4-2	AHU-4-3	AHU-4-4	AHU-4-5	AHU-5-1	AHU-8-1	AHU-9-1	AHU-17-1	AHU-17-2		
BLDG 1	BLDG 1	BLDG 1	BLDG 1	BLDG 1	BLDG 1	BLDG 1	BLDG 1	BLDG 4	BLDG 4	BLDG 4	BLDG 4	BLDG 4	BLDG 5	BLDG 8	BLDG 9	BLDG 17	BLDG 17		
2,800	1,800	2,400	2,800	2,800	1,750	3,600	3,600	2,200	1,800	1,800	1,800	2,200	2,500	1800	1045	3,600	2,400		
MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM	MECH ROOM		
VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL	VERTICAL		
FC	FC	FC	FC	FC	FC	FC	FC	FC	FC	PLENUM	PLENUM	FC	PLENUM	FC	PLENUM	PLENUM	FC		
7,500	3,000	5,000	7,500	7,000	2,000	12,000	11,500	4,200	3,000	3,000	3,000	4,000	6,600	3,200	6,800	11,500	4,600		
3,200	370	550	3,300	900	300	3,600	3,850	750	750	750	750	1,650	1,650	750	1,650	2,600	1,375		
2.00	2.00	1.20	2.00	1.20	1.00	2.00	2.00	1.00	1.00	1.00	1.00	1.00	2.00	2.00	2.00	2.50	2.00		
7.5/7.43	5/3.2	5/4.37	7.5/7.43	3/2.12	15/12.38	15/11.34	5/4.06	5/3.3	5/3.3	5/3.3	5/3.3	5/3.6	10/9.9	5/3.82	15/10.22	20/19.7	5/4.81		
00P	00P	00P	00P	00P	00P	00P	00P	00P	00P	00P	00P	00P	00P	00P	00P	00P	00P		
11.6/20	7.9/15	7.9/15	11.6/20	11.6/20	4.8/15	23.3/40	23.3/40	7.9/15	7.9/15	7.9/15	7.9/15	15.5/25	7.9/15	23.3/40	31.3/50	7.9/15			
VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD	VFD		
460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60	460/3/60		
YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES	YES		
44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56	44/56		
67.1	15.7	28.5	67.1	40.6	12.5	82.7	80.6	26.9	20.8	20.8	20.8	25.9	46.2	22.0	8.4	80.6	31.9		
13.1	3.0	17.1	13.1	4.3	5.3	16.0	15.3	7.4	6.6	6.6	6.6	6.9	6.2	7.1	2.3	15.3	18.8		
IR	IR	IR	IR	IR	IR	IR	IR	IR	IR	IR	IR	IR	IR	IR	IR	IR	IR		
472	517	515	472	519	435	500	479	525	508	508	508	500	508	508	504	542	500		
7,500	3,000	5,000	7,500	7,000	2,000	12,000	11,500	4,200	3,200	3,200	3,200	4,000	6,600	3,200	6,800	11,500	4,600		
404.5	94.7	178.5	404.5	244.5	75.2	498	484.2	161.6	125.5	125.5	125.5	156.1	278	131.9	283.7	485.5	191.9		
237.9	74.9	128	237.9	176.2	53	338.0	327.7	110.4	85.6	85.6	85.6	106.4	182.9	88.1	187.3	332.8	130.0		
82/70	77/64	77/65	82/70	77/65	77/65	80/67	80/67	78/66	78/66	78/66	78/66	78/66	79/67	78/66.6	80/67	78/66	80/67		
53.6/53.0	54.4/53.3	54.2/53.0	53.6/53.3	54.3/53.3	53.1/52.3	54.6/53.3	54.4/53.3	55/54	55/54	55/54	55/54	54.0/53.1	53.9/53.1	54/53.4	55/53.7	54.6/53.4	55/53.7		
6/12	6/12	6/10	6/12	6/12	6/12	6/10	6/10	6/12	6/12	6/12	6/12	6/12	6/12	6/12	6/12	6/10	6/10		
PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY	PICCV 2-WAY		
4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13	4" MERV-13		
JO	JO	JO	JO	JO	JO	JO	JO	JO	JO	JO	JO	JO	JO	JO	JO	JO	JO		
XTI 51 x 66	XTI 30 x 54	XTI 36 x 63	XTI 51 x 66	XTI 42 x 72	XTI 30 x 45	XTI 60 x 81	XTI 60 x 81	XTI 33 x 63	XTI 36 x 45	XTI 36 x 45	XTI 36 x 45	XTI 36 x 45	XTI 36 x 45	XTI 36 x 45	XTI 42 x 72	XTI 60 x 81	XTI 36 x 60		

9	The Pole Lighting Is Damaged And Should Be Replaced	Site	1	31,665
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The lighting pole is not scheduled to be replaced as part of the contract drawings.

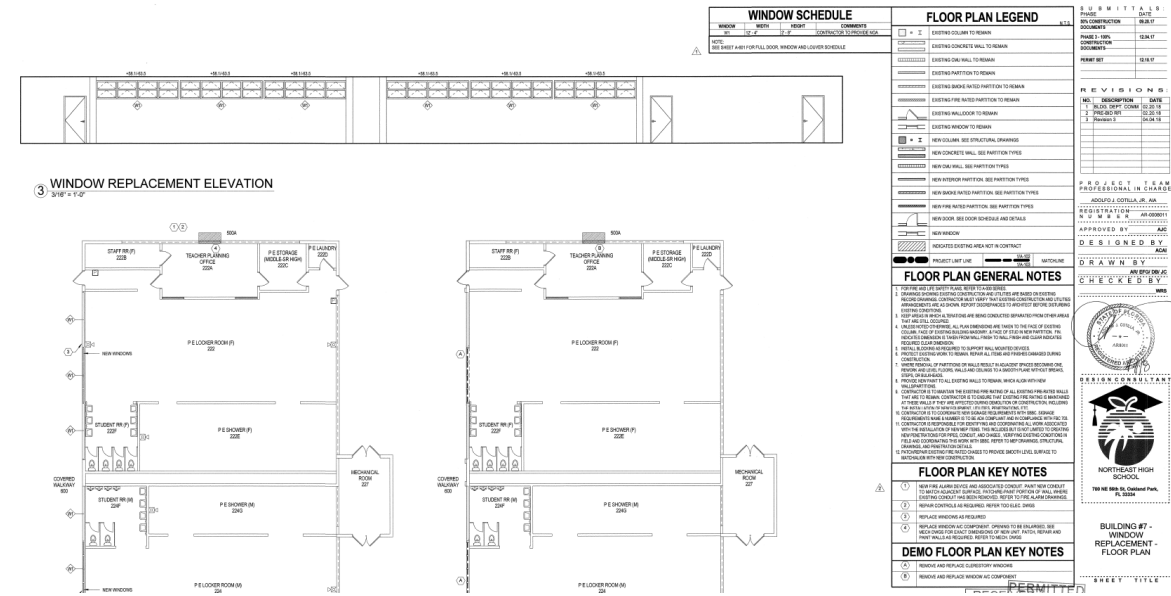
ELECTRICAL LIGHTING DEVICE SCHEDULE															
ID	DESCRIPTION	ELECTRICAL DATA			LAMP DATA		BASIS OF DESIGN			ARRANGEMENT				NOTES	
		LOAD VA	VOLTAGE	QTY	WATTAGE	TYPE	COLOR TEMPERATURE	MANUFACTURER	MODEL OR SERIES	PENDANT	RECESSED	SURFACE	CEILING		WALL
A	CEILING MOUNTED LED VANDAL RESISTANT, OPAL LENS, 8" X 54"	34.8	120-277/1/90	1	34.8	LED	4000K	FAILSAFE	FP54-LD4-1STD-40-0PL-UNV-EDC1			●			2-CIRCUIT FEED
B	CEILING MOUNTED LED VANDAL RESISTANT, OPAL LENS, 8" X 54"	71.5	120-277/1/90	1	71.5	LED	4000K	FAILSAFE	FP54-LD4-3LO-40-0PL-UNV-EDC2			●			
C	WALL MOUNTED LED VANDAL RESISTANT, 12" SQUARE W/ EYELED	38.0	120-277/1/90	1	38.0	LED	4000K	FAILSAFE	012E-LD4-30W-40-UNV-EDC1					●	
D	PENDANT MOUNTED LED VANDAL RESISTANT, 4" X 48"	47.5	120-277/1/90	1	47.5	LED	4000K	FAILSAFE	HW54-LD4-2-LD-40-UNV-0-EDC1-SCF-XX-B	●					
D1	PENDANT MOUNTED LED VANDAL RESISTANT, 4" X 48"	67.6	120-277/1/90	1	67.6	LED	4000K	FAILSAFE	HW54-LD4-2-STD-40-UNV-0-EDC1-SCF-XX-B	●					
D2	PENDANT MOUNTED LED VANDAL RESISTANT, 4" X 48"	44.2	120-277/1/90	1	44.2	LED	4000K	FAILSAFE	HW54-LD4-1-HI-40-UNV-0-EDC1-SCF-XX-B	●					
D2E	PENDANT MOUNTED LED VANDAL RESISTANT, 4" X 48"	44.2	120-277/1/90	1	44.2	LED	4000K	FAILSAFE	HW54-LD4-1-HI-40-UNV-0-EDC1-EL7W-SCF-XX-B	●					WITH EMERGENCY BATTERY BACKUP
EM1	2-HEAD HIGH-OUTPUT EMERGENCY LIGHT	5.8	120/277/1/90	2	12.8	LED	-	ISOLITE	IMR-6-12-WH-SD-VRS			●			WITH EMERGENCY BATTERY BACKUP & POLYCARBONATE SHIELD
F	4"-REV-NFPA-LED SIGN	47.5	120-277/1/90	1	47.5	LED	4000K	FAILSAFE	FP54-LD4-2-LD-40-UNV-0-EDC1-SCF-XX-B	●					
G	PENDANT MOUNTED LED VANDAL RESISTANT	48.9	120-277/1/90	1	48.9	LED	4000K	FAILSAFE	RZL-N-B-3-LAB-1-C-UNV-AC48-ST-XX-STD	●					
GE	PENDANT MOUNTED LED VANDAL RESISTANT	48.9	120-277/1/90	1	48.9	LED	4000K	FAILSAFE	RZL-N-B-3-LAB-1-C-UNV-AC48-ST-XX-STD	●					WITH EMERGENCY BATTERY BACKUP
X1	EXIT SIGN - WHITE POLYCARBONATE WITH RED LETTERS	1.1	120-277/1/90	1	1.1	LED	-	SURE-LITES	LPX-7-SD (RED LETTERS)	●			●	●	WITH EMERGENCY BATTERY BACKUP

Per sheet A-12-401 the restrooms associated with Building 12 are scheduled to be renovated.



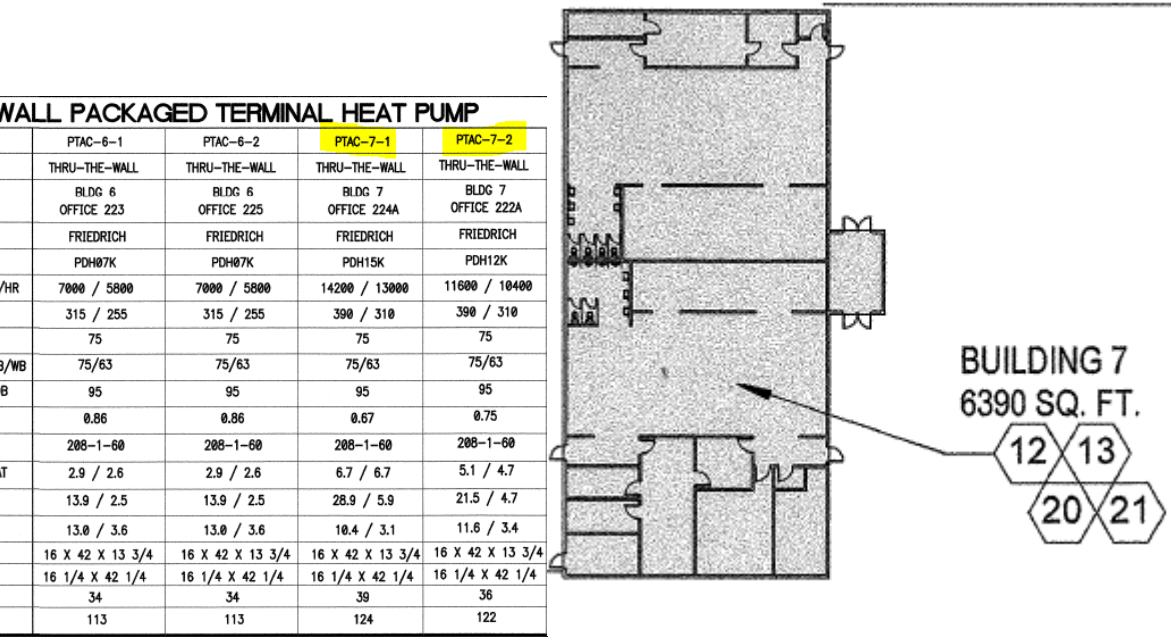
12	The Aluminum Window Is Damaged And Requires Replacement	Exterior	7	9,549
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Per sheet A07-101 the Aluminum Windows are schedule to be replaced.



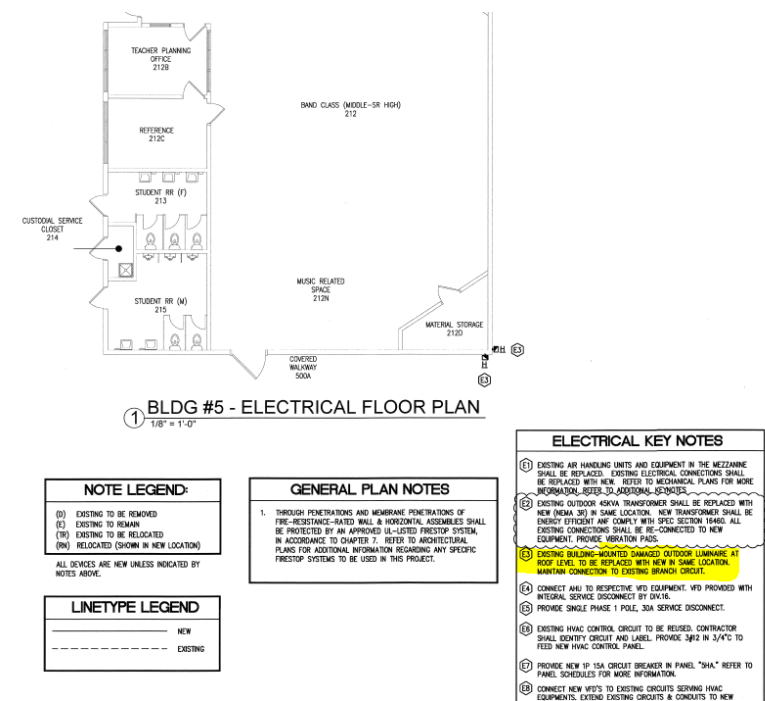
13	The Window AC Unit Component Requires Replacement	Mechanical	7	4,280
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Per sheet A.100 Note 13 “Replace Window AC Component. Refer to Mech Dwgs”. On Mech Drawings M.001 the wall package unit are included as part of the mechanical schedule.



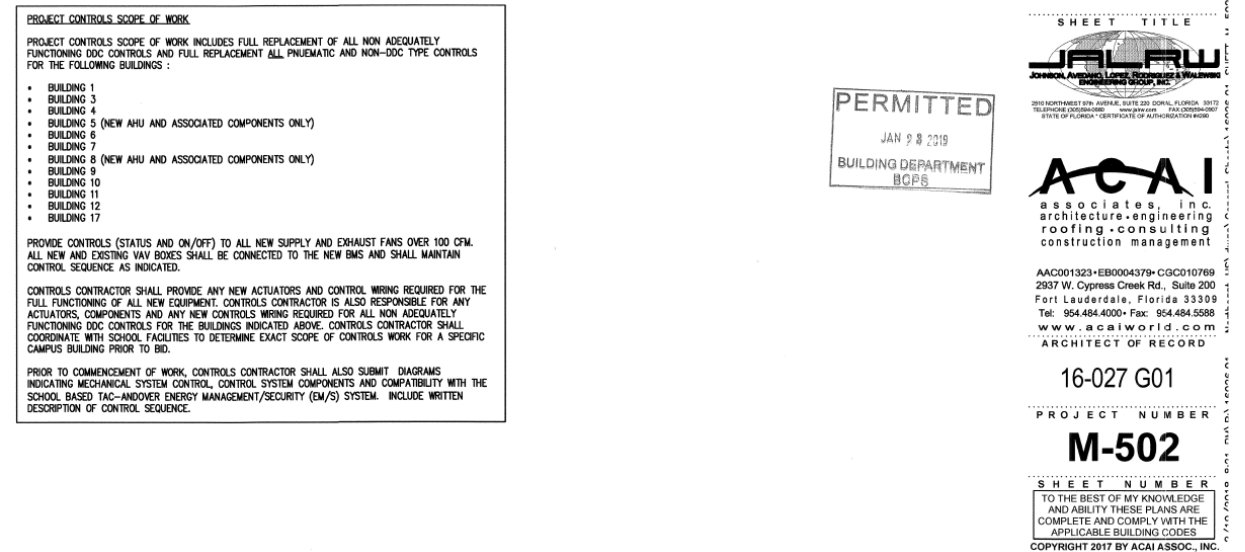
14	The Mounted Building Lighting Is Damaged And Should Be Replaced	Site	5	3,945
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Per sheet E05-201 Note E3, “ existing Building-Mounted damaged outdoor luminaire at roof level to be replaced with new in same location, maintain connection to existing branch circuit”.



15	Controls Require Repair	Mechanical	7	3,178
----	-------------------------	------------	---	-------

Per sheet M.502 Building 7 was included as part of the project control scope of work, entire controls replacement.







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