



Bond Oversight Committee

Meeting #1 September 26, 2022

Our Purpose

To bring together a committee to
review Bond project progress,
spending and schedules.

2022 Bond Program Review



***THANK YOU, VOTERS,
FOR YOUR SUPPORT!!***

PROPOSITION A



PROPOSITION B



VOTERS APPROVE BOTH BELTON ISD BOND PROPOSITIONS

Needs Addressed in the 2022 Bond

Growth

Safety and Security

Aging and Equitable Facilities

Technology

May 2022 Bond Results

<u>Issuer</u>	<u>Issuer Type</u>	<u>County</u>	<u>Elect. Date</u>	<u>Prop. Number</u>	<u>Result</u>	<u>\$ Amount</u>	<u>Purpose</u>	<u>Purpose Description</u>	<u>Votes For</u>	<u>Votes Against</u>
Belton ISD	ISD	Bell	05/07/2022	1	Carried	\$168,825,000	Building	School Building & Security	2,831	2,786
Belton ISD	ISD	Bell	05/07/2022	2	Carried	\$5,000,000	Other	Technology	2,809	2,803
	Subtotal:					\$173,825,000				

2022 Bond Proposition A

PROJECTS	Project Cost Estimates
Elementary #12	\$40,064,028
Elementary #13	\$43,567,482
Delta Program Facility	\$2,500,000
Southwest Elementary Addition	\$13,300,000
MEP, Roofing and Interior Finishes	\$8,942,812
Campus Safety + Security Upgrades	\$6,041,040
BHS CTE Addition & Band Hall/Fine Arts	\$19,596,520
BHS Existing CTE Upgrades	\$2,000,000
BNT@W Program Facility Upgrades	\$2,000,000
BHS Interior Finishes Renovation	\$6,927,894
Land Acquisition	\$7,000,897
LBMS Fine Arts Facility Expansion	\$8,582,703
Technology Infrastructure	\$676,624
New Buses	\$5,625,000
BISD Agriculture Facility	\$2,000,000
Total	\$168,825,000

2022 Bond Proposition B

\$5 Million

**Technology devices and equipment
for students, teachers and staff.**













Challenges to Construction Projects

Inflation


Lead Times

Labor Force

Examples of Material Lead Time Challenges

	Material	 Pre-Pandemic Lead Time	 Current Lead Time
	Steel Joists	3-5 months	9-12 months
	Electrical Switchgear	3-6 months	10-14 months
	Roofing Membrane	3-6 months	9-12 months
	Roof Insulation	3-6 months	9-12 months
	Precast Concrete	6-10 weeks	14-18 weeks
	loading Dock Equipment	10-12 weeks	16-20 weeks
	Overhead Doors	10-12 weeks	16-20 weeks
	Hollow Metal Door Frames	4-8 weeks	10-12 weeks
	Wood Doors	6-10 weeks	12-14 weeks
	Casework/Millwork	6-9 weeks	12-16 weeks

Source: <https://www.dbsg.com/blog/material-lead-times-and-cost-increases-impact-commercial-construction/>

 **BASE⁴**
Architects | Engineers | Designers

Discussion and Questions



2022 Bond Financial Update

BISD trustees approve sale of bonds for school projects

BY JOEL VALLEY | TELEGRAM STAFF

Jun 20, 2022



Belton ISD school board trustees Monday authorized the issuance and sale of up to \$173.8 million in unlimited tax school building bonds for projects voters approved in May.

Bond Sales

- Bonds Sold on the Market - July 28th
- Perfect timing - Week of the Fed Meeting
- A lot of issuers avoided the market
- Created demand for our issue
- Lowered the interest rate by 5 basis points
- Savings of \$2.7M in interest

Bond Closing

- Bonds closed - August 11th
- Principal Amount of Bonds - \$166,240,000
- Premium less issue costs - 7,585,000
- Deposited to Construction Fund - \$173,825,000

Tax Rate Implications

	I&S Tax Rate
2021-2022	\$.3968
2022-2023	\$.3942
Rate Decrease	\$.0026

2022-2023 Debt Service

- Anticipate using \$1.4M of Debt Service Fund Balance

Bond Expenditures Through 9/15/2022

2017 Bond Funds:

- Elementary #12
 - Architect Fees - Huckabee - \$1,627,780
 - Building Permit - City of Temple - \$12,724

2022 Bond Funds:

- Elementary #13
 - Architect Fees - Huckabee - \$433,200

Proposition B - Technology

- The \$5M debt for technology repaid in the first 5 years

Bond Expenditures Tracking

2022 Bond Projects

Local	Project	Proposition Budget	Skward Budget	Purchase Order Balance	Invoices Paid & Retainage	Available Funds	% Complete
E12	Elementary #12	\$ 40,064,028.00	\$ 40,064,028.00			\$ 40,064,028.00	
E13	Elementary #13	\$ 43,567,482.00	\$ 43,567,482.00	\$ 1,558,410.00	\$ 433,200.00	\$ 41,575,872.00	
DPF	Delta Program Facility	\$ 2,500,000.00	\$ 2,500,000.00			\$ 2,500,000.00	
SWE	Southwest Elementary Additon	\$ 13,300,000.00	\$ 13,300,000.00			\$ 13,300,000.00	
MEP	MEP, Roofing and Interior Finishes	\$ 8,942,812.00	\$ 8,942,812.00			\$ 8,942,812.00	
SAF	Campus Safety + Security Upgrades	\$ 6,041,040.00	\$ 6,041,040.00			\$ 6,041,040.00	
BHS	BHS ADDITIONS & RENOVATIONS						
	CTE Addition & Band Hall	\$ 19,596,520.00	\$ 19,596,520.00			\$ 19,596,520.00	
	CTE Upgrades	\$ 2,000,000.00	\$ 2,000,000.00			\$ 2,000,000.00	
	Interior Finishes Renovation	\$ 6,927,894.00	\$ 6,927,894.00			\$ 6,927,894.00	
		\$ 28,524,414.00	\$ 28,524,414.00			\$ 28,524,414.00	
BNT	BNT Facility Upgrades	\$ 2,000,000.00	\$ 2,000,000.00			\$ 2,000,000.00	
LND	LAND ACQUISITION	\$ 7,000,897.00	\$ 7,000,897.00			\$ 7,000,897.00	
LBM	Fine Arts & Locker Room Addition	\$ 8,582,703.00	\$ 8,582,703.00			\$ 8,582,703.00	
TEC	Technology Infrastructure	\$ 676,624.00	\$ 676,624.00			\$ 676,624.00	
BUS	New Buses	\$ 5,625,000.00	\$ 5,625,000.00			\$ 5,625,000.00	
AGR	Agriculture Facility	\$ 2,000,000.00	\$ 2,000,000.00			\$ 2,000,000.00	
		\$ 168,825,000.00	\$ 168,825,000.00	\$ 1,558,410.00	\$ 433,200.00	\$ 195,357,804.00	

Discussion and Questions



Construction Procurement Overview



FACILITIES CONSTRUCTION

BISD BOARD POLICY

CV – Facilities Construction

TEXAS GOVERNMENT CODE – Chapter 10

Section 2254 – Professional Services

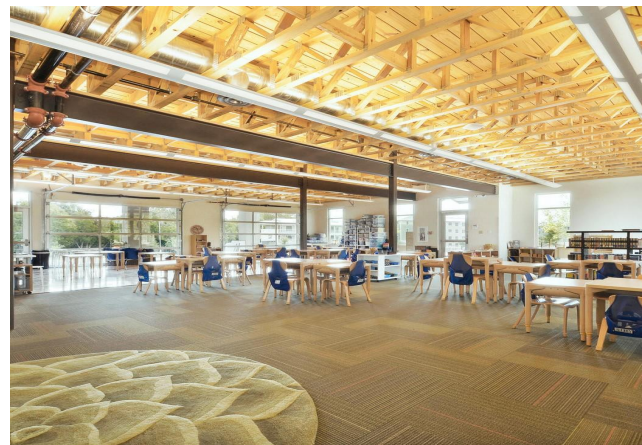
TEXAS GOVERNMENT CODE – Chapter 10

Section 2269 – Construction Services

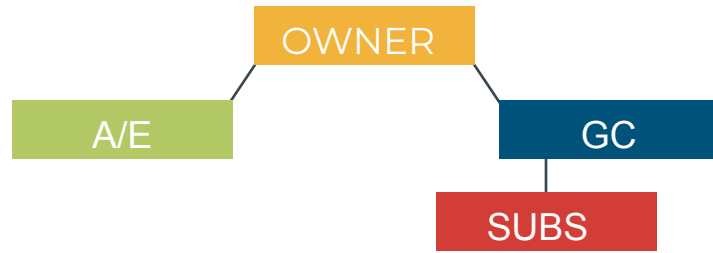
BUILDING THE PROJECT TEAM

- SELECTION OF A DELIVERY METHOD**
- HIRE THE PRIME DESIGNER (ARCHITECT OR ENGINEER)**
- HIRE THE CONSTRUCTION MANAGER (If using CM at-RISK Delivery Method)**

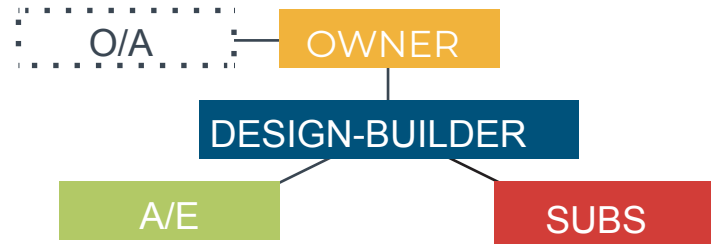
CONSTRUCTION DELIVERY METHODS



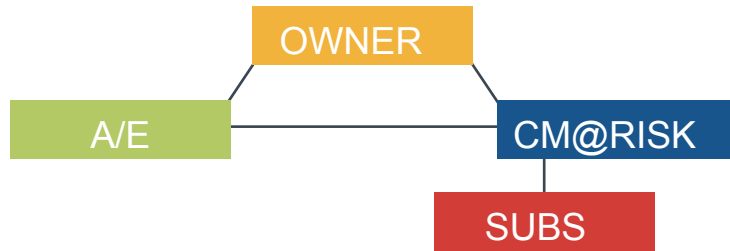
LINES OF CONTRACTING RESPONSIBILITY



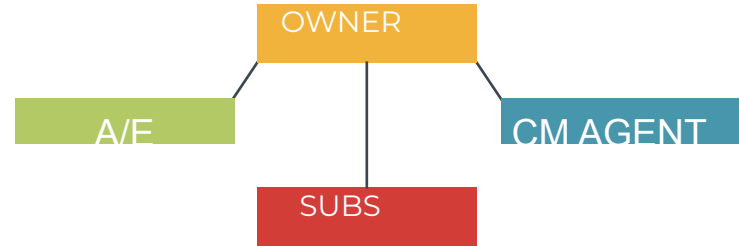
Competitive Bid or Competitive Sealed Proposal



Design-Build



Construction Manager - At Risk



Construction Manager - Agent

CONTRACT METHOD COMPARATIVE TIMELINE FOR DESIGN & CONSTRUCTION

Competitive Bid & Competitive Sealed Proposals



Construction Manager Agent



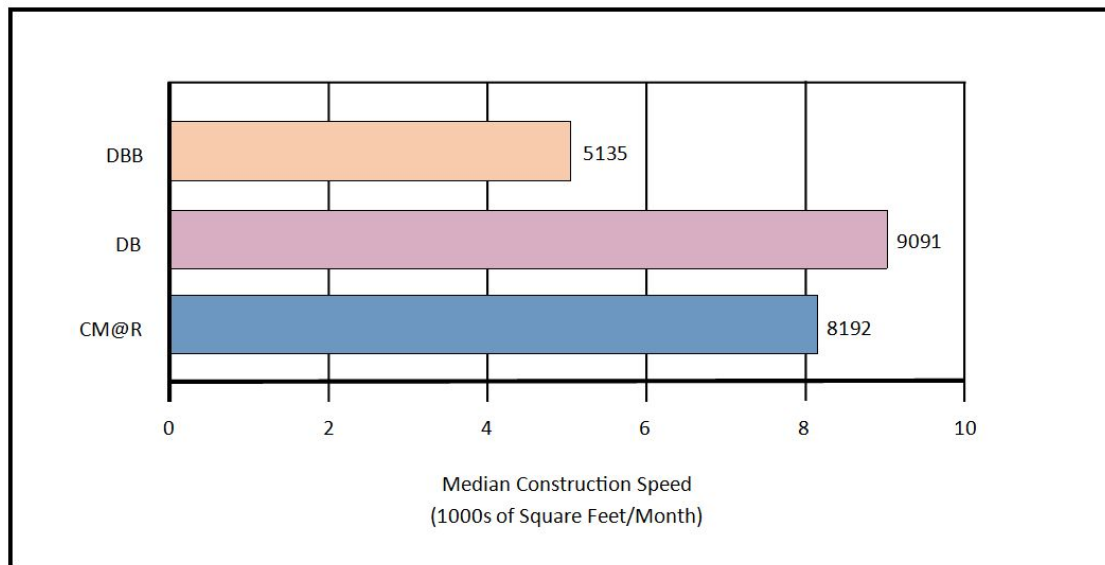
Construction Manager-at-Risk



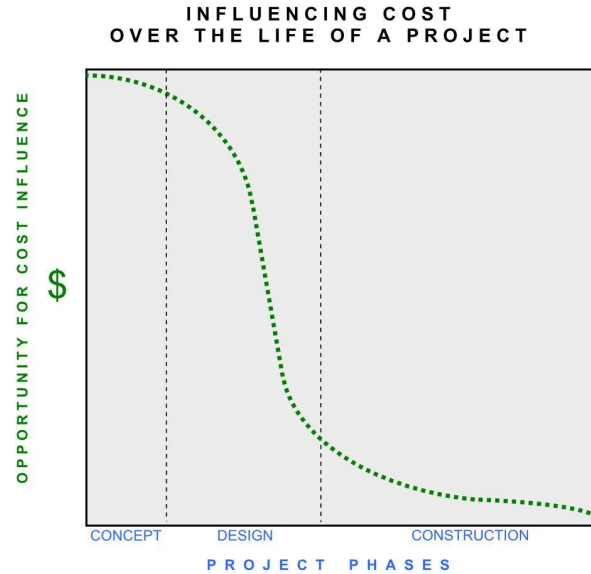
Design-Build



CONSTRUCTION SPEED



COST INFLUENCE



HIRING AN ARCHITECT OR ENGINEER

TEXAS GOVERNMENT CODE, CHAPTER 10

Sec. 2254.004. CONTRACT FOR PROFESSIONAL SERVICES OF ARCHITECT, ENGINEER, OR SURVEYOR. (a) In procuring architectural, engineering, or land surveying services, a governmental entity shall:

- (1) **first select the most highly qualified provider of those services on the basis of demonstrated competence and qualifications;** and
- (2) then attempt to negotiate with that provider a contract at a fair and reasonable price.

EVALUATION CRITERIA AND SELECTION PROCESS FOR PROFESSIONAL SERVICES

The District will designate an evaluation committee to review responses and select firm(s) based on the following evaluation criteria.

Firm's Project Approach (25%)
Personnel Experience (25%)
Firm's Experience (15%)
Ability to provide a detailed Project Timeline (15%)
References (20%)

If needed, the District may request and interview from selected firm(s).

Firms shall be ready to provide a presentation demonstrating their concise understanding of the scope of services requested to include their approach and capabilities to provide services for this project.

STATEMENT OF QUALIFICATIONS PROFESSIONAL SERVICES

Firm's Project Approach (25%)

Describe your firm's approach and capabilities to provide needed services to include methodology, design services and cost control practices.

What strategies do you have in place given the current market conditions in handling material delays?

Change orders?

STATEMENT OF QUALIFICATIONS PROFESSIONAL SERVICES

Personnel Assigned (25%)

Provide an organization chart of proposed team, identifying project roles for proposed individuals and a short summary of their Experience.

STATEMENT OF QUALIFICATIONS PROFESSIONAL SERVICES

Firm's Experience (15%)

Provide a description of the last five (5) projects for which your firm has provided services for comparable projects for a Public School or other governmental entities. Include the following for each project.

Project Name

Services Provided

Target Completion Date & Final

Completion Date Scope of

Work/Project Description

Delivery Method

Original Budget and Final

Costs Key Personnel for each

project

STATEMENT OF QUALIFICATIONS PROFESSIONAL SERVICES

Timeline (15%)

Provide a detailed project timeline to include estimated project dates, submissions of preliminary documents, schematic design and construction documents. Include how soon your firm can start on this project from date of award.

References (20%)

Provide a name and contact information for three (3) of the projects listed in question #3 above.

EVALUATION RUBRIC FOR PROFESSIONAL SERVICES RFQ

Firm's Project Approach	<ol style="list-style-type: none"> 1. Proposer provided description of approach for services to include methodology, design services, and cost control practices? 2. Proposer provided strategies in place on how to handle material delays, given current market conditions? 3. Provided process on how change orders are handled?
Personnel Experience	<ol style="list-style-type: none"> 1. Proposer's organizational chart of proposed team indicated that the firm is capable of undertaking this project? 2. Roles for proposed staff assigned to this project were identified? 3. Proposer provided a description of each proposed member's experience?
Firm's Experience	<ol style="list-style-type: none"> 1. Firm provided 5 projects for which services have been provided for comparable projects for a public school district or governmental entities? Includes: Project Name, Services Provided, Target Completion & Final Completion Date, Scope of Work, Delivery Method, Original & Final Budget and Key Personnel.
Timeline	<ol style="list-style-type: none"> 1. Timeline that includes dates for submission of documents such as, preliminary documents, schematic design and construction documents. 2. Firm stated how soon they can start from date of award.
References	<ol style="list-style-type: none"> 1. Proposer submitted three (3) references from the (5) projects listed in their experience.

HIRING A CONSTRUCTION MANAGER AT RISK

TEXAS GOVERNMENT CODE, CHAPTER 10
Sec. 2269.055. CRITERIA TO CONSIDER.

(a) In determining the award of a contract under this chapter, the governmental entity may consider:

- (1) the price;
- (2) the offeror's experience and reputation;
- (3) the quality of the offeror's goods or services;
- (4) the impact on the ability of the governmental entity to comply with rules relating to historically underutilized businesses;
- (5) the offeror's safety record;
- (6) the offeror's proposed personnel;
- (7) whether the offeror's financial capability is appropriate to the size and scope of the project; and
- (8) any other relevant factor specifically listed in the request for bids, proposals, or qualifications.

(b) In determining the award of a contract under this chapter, the governmental entity shall:

- (1) consider and apply any existing laws, including any criteria, related to historically underutilized businesses; and
- (2) consider and apply any existing laws, rules, or applicable municipal charters, including laws applicable to local governments, related to the use of women, minority, small, or disadvantaged businesses.

EVALUATION CRITERIA AND SELECTION PROCESS FOR CONSTRUCTION MANAGER AT RISK

The District will conduct an evaluation of proposals received in response to this RFP.

The District may appoint a selection committee to perform the evaluation and conduct interviews if deemed appropriate and make recommendations to the Board of Trustees.

Pursuant to Texas Government Code 2269, the District may consider the following criteria when evaluating proposals.

The following criteria will be scored on a percentage basis considered in evaluating proposals received to rank proposers.

BISD will evaluate all proposals on criteria 1(a), 2(b), 3(a), and 4(c). From these four criteria, five firms will be evaluated on all selection criteria listed below.

Offerors

Experience (25%)

Past

Performance (25%)

Proposed

Personnel (10%)

Reputation (25%)

Financial Strength &

Price-Fee Proposal (15%)

EVALUATION RUBRIC FOR CONSTRUCTION MANAGER AT RISK RFP

Offeror's experience: (25%)

1. Proposer's experience in public school construction of similar projects, comparable size and complexity utilizing the Construction Manager at Risk delivery method.
2. The experience of proposer with public schools in the Central Texas region.
3. Has the CM demonstrated a long-term presence (number of years in business) in the Central Texas market?
4. Warranty work – The program in which the CM has in place.
5. CM's proactive experience with influencing building system design relating to indoor air quality and long-term building performance.

EVALUATION RUBRIC FOR CONSTRUCTION MANAGER AT RISK RFP

Past Performance (25%)

1. Has the District or its agents worked satisfactorily with the CM in the past?
2. CM's success in completing a number of schools significantly earlier than contracted schedules and industry standards.
3. CM's record and role in achieving major cost savings prior to establishment of GMP?
4. Has the CM demonstrated a history of providing reliable pre-construction services including but not limited to cost estimating, scheduling, and professional technical consulting on means, methods, and materials of construction which provide the best value solution for the District?
5. CM's demonstrated ability to positively influence initial cost, long-term cost, and overall quality of school projects through innovation, technical expertise, and leadership.

EVALUATION RUBRIC FOR CONSTRUCTION MANAGER AT RISK RFP

Proposed Personnel (10%)

1. Are the CM's personnel experienced in similar school projects?
2. Have the proposed personnel demonstrated the ability to achieve quality work?

EVALUATION RUBRIC FOR CONSTRUCTION MANAGER AT RISK RFP

Reputation (25%)

1. Is the CM considered a “team player” or is the relationship considered adversarial?
2. Have past clients expressed a willingness to work with the CM again?
3. What is the CM’s reputation with sub-contractors and vendors?
4. What is the CM’s record and philosophy on change orders?
5. Has the proposer identified their safety program?

EVALUATION RUBRIC FOR CONSTRUCTION MANAGER AT RISK RFP

Financial Strength & Price-Fee Proposal (15%)

Has the proposer submitted documentation demonstrating financial stability to carry on the project?

Did the proposer provide bonding capabilities?

Construction Manager's Fee Proposal (Appendix C)?

Discussion and Questions



Active Project Updates



Elementary #12

Location: 8104 Glade Drive, Temple TX. 76502

Square Feet: 105,775

Capacity: 800 Students



Elementary #12

Architect: Huckabee Architects

Delivery Method: Construction Manager at Risk

Construction Manager: Cloud Construction

Estimated Total Project Cost: \$40,064,028

Approved GMP: \$35,619,429

Project Status: In Construction

Estimated Substantial Completion: Fall 2023

School Name: Recommended to Board in November CW(LOCAL)

Elementary #13

Location: Hubbard Branch Subdivision

Square Feet: In Design

Capacity: 800 Students



Elementary #13

Architect: Huckabee Architects

Delivery Method: Construction Manager at Risk

Construction Manager: American Constructors

Estimated Total Project Cost: \$43,567,482

Approved GMP: TBD

Project Status: In Design

Estimated Substantial Completion: Summer 2024

Belton High School Additions and Renovations

Location: Belton High School

Square Feet: TBD

Project Scope

- New Band Hall

- Address Theater Needs

- CTE Addition Phase 1

- Renovate Existing CTE Facilities

- Interior Renovations

- HVAC and Roofing



Belton High School Additions and Renovations

Architect: O'Connell Robertson

Delivery Method: Construction Manager at Risk

Construction Manager: Core Construction

Estimated Total Project Cost: \$32,859,414

Approved GMP: TBD

Project Status: In Design

Estimated Substantial Completion: Summer 2024

Lake Belton Middle School Addition

Location: 8818 Tarver Drive Temple, TX. 76502

Square Feet: TBD

Project Scope

- New Band Hall
- P.E Locker Rooms
- Athletic Training Room
- Gym Foyer
- Interior Finishes
- HVAC



Lake Belton Middle School Addition

Architect: O'Connell Robertson

Delivery Method: Construction Manager at Risk

Construction Manager: Core Construction

Estimated Total Project Cost: \$10,197,703

Approved GMP: TBD

Project Status: In Design

Estimated Substantial Completion: Summer 2024

Southwest Elementary Addition

Location: 611 Saunders Street, Belton, TX. 76513

Square Feet: TBD

Project Scope

- New Gymnasium

- Classrooms

- Teacher Area

- Restrooms



Southwest Elementary Addition

Architect: PBK ATX

Delivery Method: Construction Manager at Risk

Construction Manager: Core Construction

Estimated Total Project Cost: \$13,861,000

Approved GMP: TBD

Project Status: In Design

Estimated Substantial Completion: Summer 2024

New Buses

Purchase #1: \$2,630,915

Manufacturer: International

Vendor: Longhorn

Purchase:

15 - 77 Passenger for Route Service and Extracurricular Travel

5 - 54 Passenger Special Needs Buses

Price Per Unit:

77 Passenger - \$131,537

54 Passenger - \$131,572

Discussion and Questions



Meeting Takeaways

- This committee exists to serve you; Tell us what you want and need from us.
- Design and Construction will start moving very rapidly early next year.
- Challenges exist in passing Bonds and in Construction.
- Procurement process follow strict rules and each project is evaluated independently.
- We have hired Architects and Construction Managers for five projects.
 - We have hired three different architects.
 - We have hired three different construction managers.
- There will be much more detail in the next meeting.

Feedback, Additional Information, Future Topics



Thank You



Next Meeting
December 2022