



plante moran  
REALPOINT

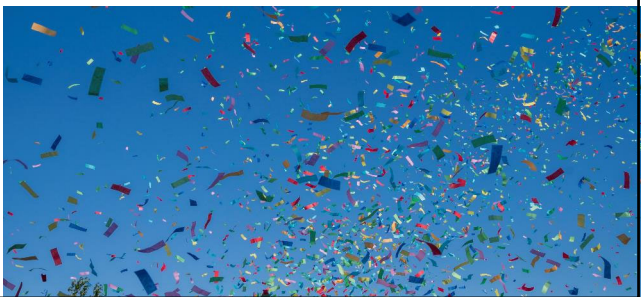
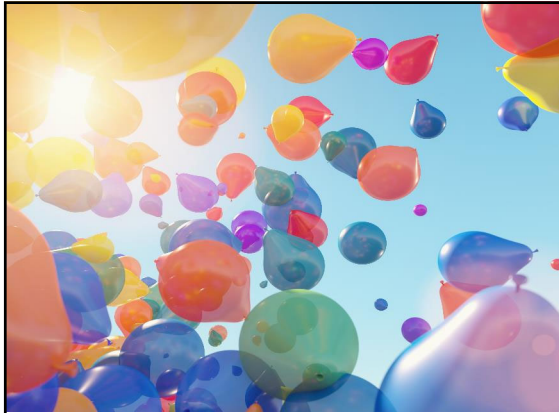
MARCH 5, 2025

# The Bond Passed... Now What?

*Presented to: Southwestern Region of*



Michigan School Business Officials



## Plante Moran – One Firm, Extensive Resources

Plante Moran is one of the nation's largest certified public accounting and business advisory firm, providing clients with financial, human capital, operations, strategy, technology, and family wealth management services.



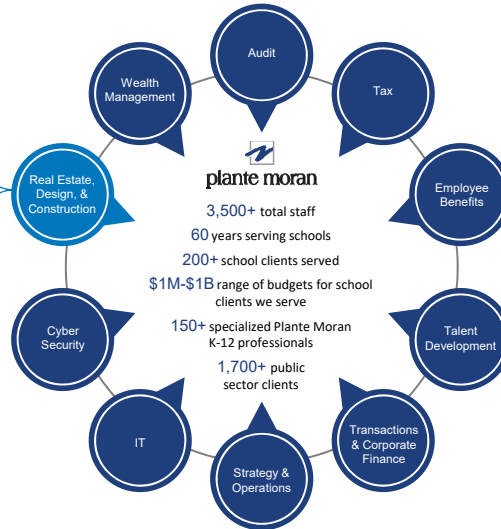
**125+** multidisciplinary staff specializing in real estate & construction

**55+** in-house design and construction professionals

**\$3B+** in construction programs completed in the last 5 years

**\$6B+** in active construction program oversight

**\$10B** in construction projects over the last 10 years



Structured differently — to serve you differently



### SEAMLESS SERVICE

Engaging with us will give you unfiltered access to the right experts at the right time through our affiliation with Plante Moran and Plante Moran Realpoint.



### PERSONAL TOUCH

The better we know you, the better we can serve you. We build lasting relationships to foster a client-focused, collaborative culture.



### FUTURE-FOCUSED

Your future is our priority. We partner with you to ensure you achieve your goals today and beyond.

## Your Presenters



### Paul R. Wills, AIA, LEED AP, NCARB

#### PARTNER

paul.wills@plantemoran.com | (248) 223-3316

Paul, a partner with Plante Moran Realpoint, is a member of the program management team, specializing in strategic planning, preconstruction and due diligence planning, project feasibility, and oversight services. Paul excels in helping decision makers define and meet key project success parameters, goals, and objectives. This includes assisting with site selection, the selection of design and construction team members, and working with clients from programming through completion.



### Doug Phillips, LEED AP

#### SENIOR VICE PRESIDENT

doug.phillips@plantemoran.com | (269) 567-4625

Doug, a senior vice president, brings more than 30 years of experience in commercial facility program management to Plante Moran Realpoint. He is responsible for the team's overall performance and service, providing capital project delivery for clients in the West Michigan region.

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**Jenae Kuipers**

**VICE PRESIDENT**

Jenae.kuipers@plantemoran.com | (616) 643-4251

As a vice president at Plante Moran Realpoint (PMR), Jenae works on a variety of West Michigan K-12 capital improvement programs as a program manager and owner's representative. She brings over 14 years of experience overseeing multimillion dollar projects.



## We bring a team of true industry experts

Our team of 100+ professionals has made serving the K-12 industry the focus of our careers. We not only monitor the regulations, legislation, economic conditions, and trends that affect the industry, but we also provide year-round counsel and education to best arm our K-12 clients to tackle the changing climate.

- Accountants/CPAs
- Architects
- Attorneys
- Construction Experts
- Development Specialists
- Engineers
- Financial Analysts
- FF&E Procurement Specialists
- LEED-Accredited Professionals
- Project Managers
- Real Estate Professionals
- Relocation Managers

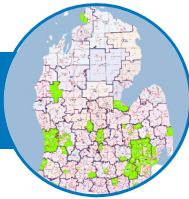
# K-12 Client Experience

Plante Moran Realpoint has worked with both large and small Districts across Michigan!

District Name	AVG FTE	District Name	AVG FTE	District Name	AVG FTE	District Name	AVG FTE
Detroit Public Schools Community District	48,782	Kalamazoo Public Schools	12,581	Rockford Public Schools	7,717	Novi Community School District	6,580
Utica Community Schools	25,701	Lansing Public School District	9,989	Birmingham Public Schools	7,538	West Ottawa Public School District	6,471
Dearborn City School District	20,417	L'Anse Creuse Public Schools	9,881	Waterford School District	7,520	Zeeland Public Schools	6,072
Ann Arbor Public Schools	17,451	Wayne-Westland Community School District	9,652	Clarkston Community Schools	7,432	Oxford Community Schools	5,792
Plymouth-Canton Community Schools	16,632	Forest Hills Public Schools	9,365	Midland Public Schools	7,380	Brighton Area Schools	5,779
Rochester Community School District	15,092	Kentwood Public Schools	9,228	Port Huron Area School District	7,361	Taylor School District	5,714
Chippewa Valley Schools	14,855	Farmington Public School District	9,108	Northville Public Schools	7,067	Grand Haven Area Public Schools	5,682
Grand Rapids Public Schools	14,034	Traverse City Area Public Schools	9,007	Grosse Pointe Public Schools	6,919	Davison Community Schools	5,645
Livonia Public Schools	13,457	Portage Public Schools	8,599	Bay City School District	6,875	Woodhaven-Brownstown School District	5,521
Warren Consolidated Schools	12,947	South Lyon Community Schools	8,277	Hudsonville Public School District	6,841	Grandville Public Schools	5,519
Troy School District	12,815	Huron Valley Schools	8,235	Lake Orion Community Schools	6,802	Anchor Bay School District	5,387
Walled Lake Consolidated Schools	12,622	Grand Blanc Community Schools	7,987	Howell Public Schools	6,713	Bloomfield Hills Schools	5,321

Plante Moran Realpoint clients with similar services to your District

Plante Moran Realpoint has worked with K-12 clients across the state (highlighted in green) from the edges of the Great Lakes to the heart of Mid-Michigan!



# Now the Work Begins

Time is Money, and, Decisions loom! Issues you may not be familiar with:

- Property Surveys and Soil Borings
- Hazardous materials assessments and plans
- Technology & Furniture Consultants
- Prevailing Wage Laws
- Professional Services RFPs
- Setting Budgets and Schedules
- Governance, Approvals & Contingencies Planning
- Meanwhile – **Continue to run your District!**

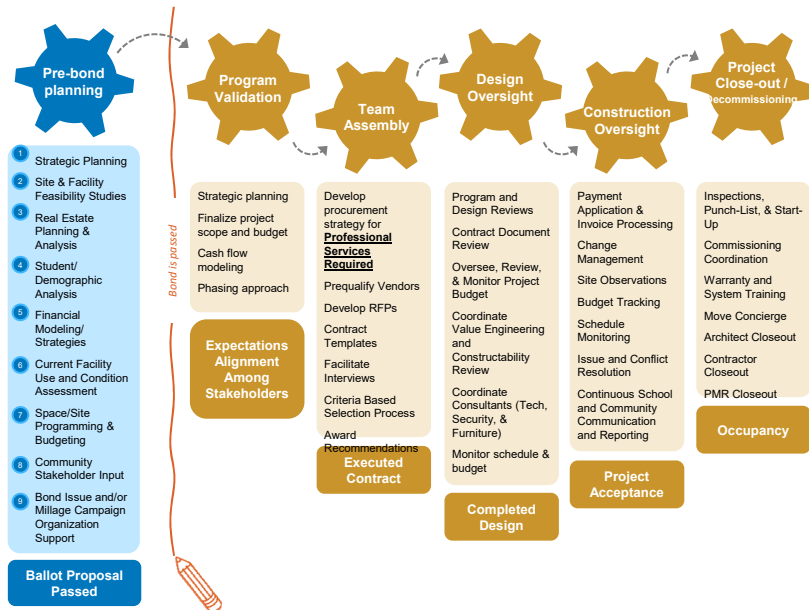


## Approach to K-12

Concept through completion...do you have the right team?

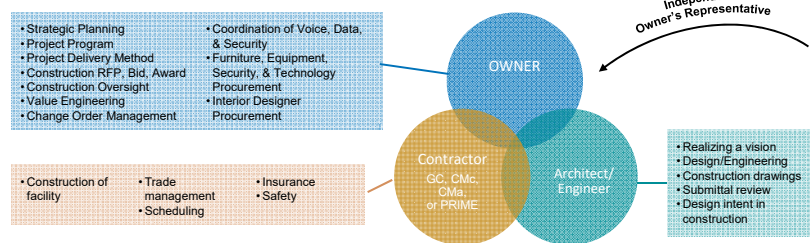
## Plan the Work...

## Work the Plan!



## Big, Complex Capital Programs = Big Risks

Who is doing what?

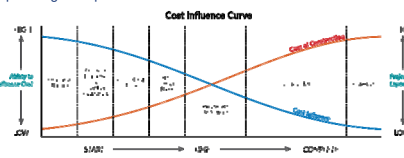


The role of the owner and independent program manager



Successful project: Concept through completion

Organizations who engage PMR prior to engaging architects, contractors, and vendors have the most opportunity for a successful project. PMR has extensive experience in contract negotiation and is a valued advocate sitting only on your side of the table throughout all phases of the project.



Comprehensive organization and effective execution are critical to each project and the overall program success.

The quality of project delivery will define both the program's cost effectiveness and the success of the technical solutions. Our multidisciplinary team brings the highest-quality resources, processes, and procedures to assist with:

- Scheduling
- Budget and Cost Control
- Procurement of A/E, CM, & Related Vendors
- Design/Construction Review and Oversight
- Change Management
- Risk Management
- Value Engineering
- Cost Estimating

## Managing Risk in School Bond Programs



### Contract Risk

Your legal counsel will assist you with contract language but will not typically advise on business terms. Having knowledge and experience of what is fair and reasonable for these business terms is critical. This single factor alone can save you hundreds of thousands of dollars in fees and risk exposure.



### Schedule and Cost Escalation Risk

Design and construction industry service providers are all operating at or above their organizational capacity. Understanding what timeframes are reasonable for planning, design and execution of the work will get your projects bought out sooner, and completed faster, allowing you to gain the benefit of improvement, and avoid inflationary cost impacts.



### Business Risk to Your On-going Operations

Your Business and Facilities Operations team members may have difficulty managing a complex bond program while also remaining focused on their principal responsibilities of running your District.



### Compliance Risk

There are numerous state contracting and financial reporting rules that apply to bond program dollars, and they are ever-changing. The state just last month re-instituted prevailing wage requirements for qualified bond programs.

These risks have the potential to cost hundreds of thousands of dollars, many of which you may never be aware you have incurred, others you could become painfully aware of.



## Program Validation

### Budgeting & cost control

Important to have a process to successfully manage costs

- ✓ Establish a realistic initial full program budget with reasonable project contingencies.
- ✓ Facilitate design process to minimize the introduction of added scope. Budget reviews at each design milestone.
- ✓ Ensure the project schedule is aggressive, yet realistic, and has a well-planned phasing sequence.
- ✓ Continuously monitor the status of the project, asking questions of the design / construction team to ensure there are no "holes" in the project scope with respect to construction items, phasing costs, and furniture, fixture, and equipment coordination.
- ✓ Perform a thorough review of all proposed changes. Always ask: is this legitimate? What can be done as a "no cost" or lower cost solution? Explore viable alternate solutions that might minimize costs.
- ✓ Continuously update actual costs vs. budgeted costs to avoid any financial "surprises".
- ✓ Manage all owner provided FF&E elements as diligently as the design and construction costs are managed.



## Team Assembly

Architect/engineer, construction management, & vendor procurement

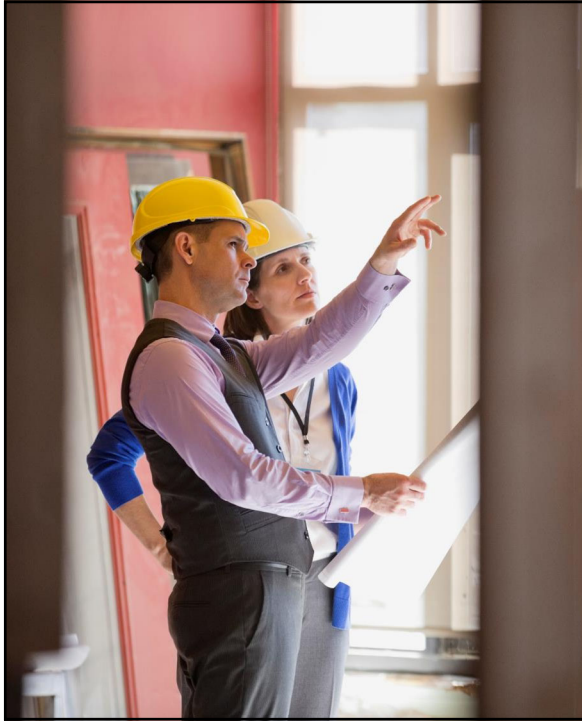
- Identify experienced contractors
- Utilize a selection process with weighted selection criteria that matter to your team
- Team selection
- Architect/engineer: A criteria-based selection process
- Contractor: A selection process based on **qualitative & quantitative** data
- Contracts terms that protect you, the Owner
- Other vendors



## Design Oversight

Key elements to successfully managing the design process include:

- ✓ Set up informal work teams for direction and approval
- ✓ Review design drawings for any potential phasing constraints
- ✓ Coordinating the delivery of requested data and input from staff
- ✓ Define process for document review, constructability input, and budget verification moving forward
- ✓ Review drawing for compliance with owner's expectations
- ✓ Obtaining local and state approvals - ensure a complete matrix is developed of what is necessary



## Construction Oversight

- ✓ Maintain strong information flow between design and construction team
- ✓ Making good decisions with respect to field issue resolutions
- ✓ Facilitate the change management process to ensure not only that costs submitted are fair and equitable, but also that final costs for any particular event reflect the best overall solution to the problem
- ✓ Review schedule updates and verify work is progressing as required. If not, require Construction Manager in defining and implementing an acceptable correction plan
- ✓ Ensure all owner furnished elements arrive in a timely manner as to not delay the construction trade work
- ✓ Maintain stakeholder relationships during the process which involves the project team, design team, construction management team, and all other suppliers and vendors engaged in the project

## Capital Program Cost Management Services

- ✓ Establish project governance structure and accounting procedures and controls
- ✓ Develop processes that allow the project team to work efficiently and collaboratively to process payments, approve contracts and change orders, and complete many of the day-to-day challenges large programs face.
- ✓ Establish document control to verify executed contracts, bonds, and insurance are on file
- ✓ Track cost escalation and inflation data across the construction industry

- ✓ Set up and monitor PMIS environment for owner and vendors with project budget, commitments, expenditures, and reporting
- ✓ Establish project reporting guidelines and deliverables such as dashboards, cash flow, budget and commitments, and cost to complete reports
- ✓ Track project budget, commitments and actual costs through Trimble Unity Construct
- ✓ Complete financial reconciliation of project commitments, actual spend, and cost to complete
- ✓ Reconcile pay applications, sworn statements, and waivers to promote subcontractors being paid timely and accurately
- ✓ Timely, accurate and complete financial closeout

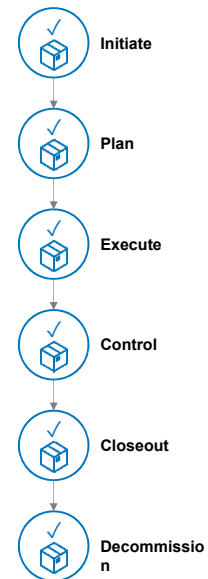






## Project Close-out / Commissioning

- Strong contract terms leverages timely close-out
- Costs associated with completing requirements
- Defined process for project close-out
- Move and Occupancy Coordination
- Warranty follow up!



## Relevant Clients



**Jackson Public Schools**

Architect and Construction Manager procurement, contract negotiations, and set up with the district's initial program.  
Dan Evans (retired Superintendent)



**Homer Community School District**

Owner's representation for \$18 million with new 68,000 SF, two-story school that replaces a 54,000 SF middle and high school that was built in 1946.

Rob Ridgeway (Former Supt.) Superintendent, Harper Creek  
269-441-6558



**Napoleon Community Schools**

Owner's representation for \$18 million in district-wide improvements at the educational buildings including athletic, academic, MEP and building envelope upgrades.

James Graham, Superintendent  
517-905-5705 Jim.graham@napoleonschools.org



**Lakeview School District**

Consulting, owner's representation, enrollment projections, facility assessments, and bond planning leading to renovations, additions, and site work across 15 facilities. \$195 million (2020), \$65 million (2015)

Dr. William Patterson, Superintendent  
wpatterson@lakeviewspartans.org (269) 832-7071



**Caledonia Community Schools**

Facility assessment, pre-bond planning, building utilization study, demographics analysis, and program management services for two bond programs including new construction, renovations and additions totaling to \$88 million.

Dirk Weeldreyer, Interim Superintendent  
weeldreyerdc@calschools.org



**Milan Area Schools**

Facility assessment, pre-bond planning, building utilization study, demographics analysis, program management services for \$49 million in district renovations and additions

Bryan Girbach 734-439-5050 girbachb@milanareaschools.org

## Relevant Clients



Grand Rapid Public Schools

Consulting, owner's representation, facility assessments, and bond planning services for \$180 million in renovations, additions, & site work for 30 facilities and 1.2 million SF.

Dr. Leadriane Roby, Superintendent  
robyl@grps.org | (616) 819-2193



Northview Public Schools

Facility assessments, pre-bond planning, demographics analysis, building utilization studies, program management services for \$34 million in renovations across the district

Julie Bylsma, Finance Director  
jbylsma@nvps.net



Lansing School District

Program management services totaling \$129 million focused on design and construction of several new elementary schools and building renovations.

Mr. Ben Shuldiner, Superintendent  
(517) 755-1010



Portage Public Schools

Consulting, owner's representation, program management for \$175 million bond program, including procurement of professional services, planning, design oversight, construction oversight, focused on new elementary schools

Mr. Mark Bielang  
269-323-5161 mbielang@portageps.org



Cassopolis Public Schools

Owner's representation for \$16 million bond program, which covered 95,248 square feet of space.



Three Rivers Community Schools

Owner's representation for \$61 million bond program (2019), including districtwide infrastructure improvements

Congratulations - you made it!

Questions?



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Thank you!

[pmrealpoint.com](http://pmrealpoint.com)

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