



October 13, 2022 – REVISED 11/14/22

Mt Vernon Community School Corporation  
Dr. Jack Parker, Superintendent  
1806 IN 234  
Fortville, IN 46040

Re: Owner's Representative Services for MVCSC Capital Projects

Dear Dr. Parker,

The Veridus Group, Inc., is pleased to provide the following proposal for the project management and owner representation services for the Mt. Vernon Community School Corporations projects located in Fortville, Indiana. We have prepared a scope of services based on our conversations, our understanding of the proposed project, and our experience with similar projects.

Veridus will provide the management services necessary to guide the School's Administrative Team, School Board and building committee through the relationships with the design and construction teams, and assist through the development of plans and specifications as well as the construction, for completion of the project as described in the Project Description below. We understand MVCSC has determined to deliver the projects via the Construction Manager as Agent (CMa) model and has hired AECOM Hunt as the CM for the project. The designer of record is Beebe Design.

## **PROJECT DESCRIPTION**

The Mt. Vernon Community School Corporation is underway with significant capital projects totaling over \$100 million by making improvements to existing schools as well as constructing a new elementary school and transportation center on recently purchased property on the north side of the existing middle school campus and administration building. It is our understanding there is approximately \$70M left to be managed and controlled through the delivery of the outstanding projects.

Each project is in a slightly different phase of design or construction. Veridus is prepared to step into each project as directed by the MVCSC team, no matter which phase and provide value to the team in the delivery process. Our team will work to get caught up on the project details quickly and efficiently so as not to lose any momentum the team has gained to date. These are exciting projects for the community and we look forward to being a part of the solution in delivering these on time and budget.



## PROJECT APPROACH

While there are various projects in various phases of planning and design, we typically take all projects through the following phases. In our first meeting, we would work with the team to make sure we fully understand the status of each project. Additionally, we need to work with AECOM Hunt on the project schedule. The breakdown of the phases is as follows:

**Phase I – Visioning / Due Diligence / Team Development / Conceptual Design / Site Selection**

**Phase II – Schematic Design and Design Development**

**Phase III – Construction Documents and Bidding**

**Phase IV – Construction Period**

**Phase V – Closeout, Commissioning and Warranty**

## PROJECT SCOPE OF SERVICES

The following is a general scope of services we typically perform on projects within the phasing structure above. While not every item may be applicable for every project, this is meant to be a representative list of the services we provide.

### 1. Pre-Construction Services (Phases I – III)

- ~~A. Work with the Owner to identify project goals and create “guiding principles” for the future development of the project.~~
- ~~B. Work with the Owner to author the Request for Qualifications/Proposals for a “BOT” delivery method (insert delivery method here) and navigate the solicitation, interviewing, and selection of qualified firms.~~
- C. Develop or confirm a collaborative document management system for the design and construction teams and establish a communication protocol.
- D. Work with Owner, and Developer to develop/confirm project development schedule.
- E. Work with Owner, A/E and Developer to develop overall pro-forma budget including breakout of construction and non-construction costs (soft costs including all misc. fees).
- ~~F. Work with Developer throughout schematic design phase to validate or revise the project schedule and budget.~~
- G. Attend, participate, and document periodic design meetings with various departments, officials, local authorities, etc.
- ~~H. Review and comment on plans and specifications as they are developed.~~
- I. Conduct a Safety and Security analysis through a Crime Prevention Through Environmental Design (CPTED) review at SD, DD, and CD.
  - a. Site landscaping and hardscape review.
  - b. Building enclosure and hardened spaces review.
- J. Recommend design and construction alternatives. Lead the value engineering discussions with Construction Manager to determine most viable and economic solutions.
- ~~K. Assist in the coordination of the design and design review process.~~

- L. Assist with bidding and selection. Review bidding documentation to confirm conformity to State statutes.
- M. Analyze cost estimates and provide documented reviews.
- N. Assist in the coordination of the design and design review process.
- O. Communicate critical information to the appropriate School staff personnel and receive feedback for the design team. Communicate the response back to the project teams.
- P. Facilitate coordination between MVCSC Admin, staff and design and construction teams.
- Q. Provide weekly updates to School representatives on pending action items.
- R. Work with School's communications staff on important information updates to the general public.
- S. Facilitate procurement of services outside of Contractor if required.
- T. Facilitate a final safety and security assessment of the design documents
- U. Assist School and Construction Manager with determining options, evaluating options, and implementing temporary relocation of operations at alternative sites during construction if required.
- V. Other services as needed.

## **2. Construction Period Services (Phase IV – Construction Period)**

- A. Assist School with internal and external communications to keep all stakeholders well informed regarding project status and any impacts to operations.
- B. Coordinate with the Contractor to ensure all contractual requirements are met.
- C. Attend site meetings weekly and represent the Owner at these meetings, and prepare/coordinate complete and accurate minutes for such meetings.
- D. Tour the construction sites with the Contractor (and Owner if desired) at least once per week to observe the progress and quality of construction.
- E. Perform periodic building envelope reviews and make recommendations to the design and construction teams on opportunities and issues.
- F. Render advice and assistance to Owner in order to develop economic, efficient, and desirable design, development and construction procedures.
- G. Review and render advice to Owner concerning product samples and specifications provided to Owner by contractor, subcontractors, and material suppliers for use at the Project.
- H. Receive suggestions or recommendations from which could improve the Project or diminish construction time or costs through a standardized value engineering process.
- I. Review and track all necessary conditional and unconditional lien releases and waivers, and keep Owner informed of the status of all lien releases.
- J. Review all change orders issued by Developer regarding the Project and render advice to the Owner about the form and content of such change orders in relation to the plans, specifications and the contract documents.
- K. Monitor the schedule and budget with relation to the requested change orders and prepare schedule and/or cost recovery plans to keep the project on budget and schedule.
- L. Review and make recommendations on all payment requests pursuant to the contract documents, developer's agreements, or other consultants' agreements related to the Project.
- M. Identify possible payment defaults on the part of contractors, subcontractors, material suppliers or any party who may have lien rights against the Project.

- N. Perform periodic inspections of the Project at least once a week, or as deemed necessary, to verify: (i) that the materials and labor being furnished are according to the plans, specifications and contract documents, (ii) that the work being billed for in each payment request is completed in accordance to the plans, specifications and contract documents, (iii) that the contractor's time schedule is being maintained, as shown as attached to the construction contract, and (iv) that the costs are in line with the Owner's budget.
- O. Facilitate a safety and security site walk and tour for local emergency response authorities (Police, Fire, EMT)
- P. Assist Owner and Construction Manager in the preparation of punch lists for the Project, coordinate and assist Owner in scheduling the completion of all such corrective work, and participate in all inspections.
- Q. Monitor schedule and budget and provide regular updates to involved parties.
- W. Facilitate coordination between MVCSC Admin, staff and design and construction teams.
- R. Provide weekly updates to School representatives on pending action items.
- S. Facilitate procurement of services outside of Contractor, if required
- T. Other services as needed

### **3. Post-Construction Services (Phase V – Closeout, Commissioning and Warranty)**

- A. Oversee the final building commissioning of all mechanical, electrical and plumbing systems.
- B. Oversee the final commissioning of the building envelope.
- C. Coordinate the installation of any Owner Furnished Equipment
- D. Oversee the assembly of documentation for operations and maintenance manuals, as-built documents to include in a final digital project manual.
- E. Address critical warranty issues as they arise during the 12-month warranty period.
- F. Perform the warranty walk-through and punch list 11 months after substantial completion and make notification to the Construction Manager of any outstanding warranty issues.

## **COMPENSATION**

We are excited to help MVCSC in the achievement of their goals and look forward to being an extension of your staff on a daily basis. Given we have a good understanding of the projects and desired project goals, we have prepared the following fee for your consideration. If we need to tweak the fee based on projects in different phases, we are happy to have that conversation with the MVCSC team.

We would recommend compensation for the services rendered be billed lump sum and invoiced monthly (in arrears). Full payment of invoices is due within 30 days from invoice date. Given that each project is in a slightly different phase of design or construction, we have included a total fee for the projects with an expected monthly billing chart. If we need to break down our fee based on project or phase, we can work with your team to do that.

**Project Total: \$435,000**

With the intent to occupy the elementary school in the summer of 2025, we have extended the capital project timeline through 2025 to cover move-in, start-up and some on-going warranty issues. Future warranty items through 2026 have now been included.



## PROPOSED PAYMENT SCHEDULE

2022	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
											\$4,368	\$9,445
2023	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
	\$10,949	\$12,442	\$12,442	\$12,659	\$12,659	\$11,670	\$11,670	\$11,670	\$11,670	\$11,073	\$9,579	\$8,920
2024	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
	\$10,413	\$10,413	\$10,413	\$11,670	\$11,670	\$11,670	\$11,670	\$11,670	\$11,670	\$11,073	\$8,920	\$8,261
2025	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
	\$10,413	\$10,413	\$10,413	\$11,670	\$11,670	\$11,670	\$11,670	\$11,670	\$11,670	\$11,073	\$8,920	\$8,261
2026	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
	\$1,855	\$1,855	\$1,855	\$1,855	\$3,657	\$5,450	\$5,450	\$2,185				

## REIMBURSABLE EXPENSES

Given the close proximity to our office, our fee includes any vehicle or mileage needs. No out-of-state travel is anticipated for the project. The following expenses will be considered reimbursable and will be invoiced at their direct cost on the monthly invoices.

- A. Overnight postage, certified mail, and delivery services
- B. Permit or applications fees as paid by Veridus

If payment is not made within 30 days of the date when the payment is due, we may, at our option, and effective upon the delivery of written notice of our intention to do so, terminate the contract or suspend further performance of our services under the contract, and we shall have no liability for delay or damage that results from the termination of the contract or suspension of services.

Dr. Parker, we thank you for this opportunity and look forward to working with you on this project. The fees for services contained in this proposal are valid for six months from the date of this letter. If the terms of this proposal and the attached agreement are agreeable, we will schedule a kickoff meeting with your team and begin the work.

If you have any questions, please feel free to contact our office at (317) 598-6647 or call me directly on my cell number listed below.

Sincerely,

Timothy M. Jensen, PE, LEED AP  
President  
317-450-7653

Accepted

Date