



BEYOND
THE BUILD

**Hallsville R-IV School District
Proposition 2**

**Primary School
Gymnasium & Classroom Additions**

SMWILSON
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Progress Report #1
April 2019

Hallsville School District

Proposition 2 – Primary School Gymnasium & Classroom Additions

Progress Report #1

April 12, 2019

Provided For:

Hallsville District Administrative Team
Hallsville R-IV School District
421 E. Hwy 124
Hallsville, MO 65255

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BEYOND THE BUILD

April 12, 2019

Hallsville District Administrative Team

Attn: Superintendent - John Downs
421 E. Hwy 124
Hallsville, MO 65255

Mr. Downs,

Please find enclosed the first progress report for the Proposition 2 - Primary School Gymnasium and Classroom Additions Project.

With the progression of the program efforts, we wanted to start this monthly update process for you, the school board and all other stakeholders for this project. This report will be expanded as the project develops to include critical information and any board action items needed to keep the project on track for a successful completion of the overall program requirements.

Included in this first report, you will find a brief update on the design process and budget check efforts that have been ongoing since the contracting of our firm for this program. The outline within this report is our first pass at what we would expect to provide on a monthly basis as the project continues. This report can be expanded to include anything else that you or the district stakeholders would require.

As the project matures, we will incorporate more overall budget and schedule documentation to provide an all-encompassing report on the project's progress.

Should you have any questions or concerns regarding this report and update, please contact me at any of the methods noted below.

Sincerely,

A handwritten signature in black ink, appearing to read "Kort Cole", is written over a light blue horizontal line.

Kort Cole | Project Director
2185 Hampton Ave. | St. Louis, MO 63139
314.633.9658 direct 314.393.9076 cell 314.645.1700 fax

S. M. Wilson & Co. | [website](#) | [facebook](#) | [linkedin](#)
100% Employee Owned / Equal Opportunity Employer

II. Design & Engineering Update:

Design & Engineering Narrative:

Klinger & Associates, P.C. has completed and issued the 100% design development set of project documents on March 4, 2019. These updated documents included further refinement and details of the project for district coordination and understanding, as well as providing more accurate building components for pricing and constructability reviews and confirmations by S. M. Wilson & Co. This updated set of documents is a progression set and generally represents a 50% +/- completed set of construction documents.

During the refinement of the design development documents a few changes have been made from the previously presented plans. The first notable item was the determination that the fire alarm system for the entire building would need to be upgraded to include voice audible devices due to the most recent codes combined with the expansion of the facility. There have also been some adjustments made to the restrooms in both the gymnasium lobby and the classroom addition. The gymnasium lobby has been adjusted for the removal of the initially proposed generator room which has provided some additional storage in this area. The emergency backup power requirement have been solved with inverters in lieu of a generator. The 2nd grade classroom wing restrooms have been moved closer to the main building to work better with the existing sewer lines. Additional site work has been included with additional sidewalks and utility definitions. Some program enhancements along with the other design directions discussed at the December 12, 2018 special board meeting have also been incorporated into this current 100% design development set of documents.

Klinger & Associates, P.C. presented the current 100% design development documents to the school board at the March 18, 2019 school board meeting and answered questions about the current direction of the project design.

III. Permitting Update:

City of Hallsville Building Permit:

Once the 100% construction documents are completed, Klinger & Associates, P.C. and S. M. Wilson & Co. will provide the final project documentation to the City of Hallsville for permit review and issuance.

Boone County Building Permit:

Klinger & Associated, P.C. has been working with Boone County representative to assure the building is being coordinated with current code interpretations by the County. Once the 100% construction documents are completed, Klinger & Associates, P.C. and S. M. Wilson & Co. will provide the final project documentation to Boone County for permit review and issuance.

IV. Contracting Update:

Bidding & Procurement Narrative:

As the construction documents are completed during the next phase of design, subcontractor bid packages will be prepared for each category of work that will be needed to complete this project. These subcontractor bid packages will be developed by S. M. Wilson & Co. and will be coordinated with the district and design team to assure complete coordination with the project's needs. Additionally, these subcontractor bid packages will be sized and coordinated to accommodate the local market in order to get the best bidder coverage and provide the best overall value to the district. We anticipate a three (3) week bidding timeframe once the project documents are completed. One additional week will be needed to review and evaluate the subcontract bids received in order to provide the guaranteed maximum price (GMP) to the district. The GMP approval by the district will be presented at a future board meeting. Once the GMP is established a publication will be provided for the bid results of all subcontractor bidding efforts, as required by Missouri statute.

Subcontractor Bid Evaluation Process:

As required by state statute, a bid evaluation process will be prepared prior to the formal bidding of subcontract work packages. This evaluation documentation and process will be initially prepared by S. M. Wilson & Co. and will be coordinated with the school district and design team to determine the factors to be utilized for determining the best value subcontractors for the project. The subcontractor bid evaluation process will allow S. M. Wilson & Co. to provide an objective rating of each subcontractor's bid based on the factors that are most important to the project. This review and evaluation process will be shared with the school district and design team to determine a recommendation for subcontracts needed for the project. Once these recommendations have been made, a final GMP will be established for the project.

Guaranteed Maximum Price (GMP) Review & Approval:

The guaranteed maximum price (GMP) will be prepared and presented at a future board meeting for approval after subcontractor bids have been received, evaluated and recommended by S. M. Wilson & Co.



BEYOND THE BUILD

Contract Changes:

As discussed at the last board meeting, S. M. Wilson & Co. is requesting to make a change to our project manager listed within the contract documents to address a conflict in current commitments. As part of this report, we are requesting approval of the proposed project manager change from Steve Platt to Patrick Aylesworth in accordance with the terms of our contract. We are including a copy of Change Order Request 1 (COR 1) along with Patrick's resume for informational purposes and will be looking for board approval of this change at the April 15, 2019 school board meeting. This change does not affect any other contractual terms or financial obligations for the project and represents a zero dollar change to the overall contract cost.



S. M. Wilson & Co.
 2185 Hampton Ave.
 St. Louis, MO 63139
 Tel: 314-645-9595
 Fax: 314-645-1700

CHANGE ORDER REQUEST
No. 1

TO: HALLSVILLE R-IV SCHOOL DISTRICT
 421 E. Hwy 124
 Hallsville MO 65255

JOB #: 0118061.00

ATTN: John Downs

JOB NAME: Hallsville School District -
 Capital Improvement Project

RE: Project Manager Change Request

DATE: April 12, 2019

Please find enclosed a change order request for the change of our project manager for this project, as required by the terms of our contract. This request will not alter any other contract terms and has no cost impact on the project.

Description	Net Amount
Project Manager	
Change of project manager from Steve Platt to Patrick Aylesworth. A resume for Patrick has been provided as part of this change order request. There is no cost change associated with this request.	0.00
Subtotal:	\$0.00
:	
Total Cost	\$0.00

- NOTES: 1. The approval of this Change Order Request is important to the progress of this project. Your approval is required as soon as possible. Upon execution of this Change Order Request, a Change Order will be processed and forwarded to you for signature.
 2. This work is on hold pending authorization unless previously authorized.
 3. Extension of time necessary for this change is 0 calendar days.

This form will serve as our written authorization to proceed with the above work pending an official change order to our contract showing the revised contract amount.

HALLSVILLE R-IV SCHOOL
 DISTRICT

KLINGNER & ASSOCIATES, P.C.

S. M. WILSON & CO.

John Downs

John Neyens

Kort Cole

 Authorized Signature

 Authorized Signature

 Authorized Signature

 Date

 Date

 Date

Patrick Aylesworth, LEED Green Associate

Project Manager



Patrick has the proven ability to handle projects of all sizes and scope. He is meticulous and conscientious in his dealings with subcontractors and material suppliers, and has proven to be an excellent communicator with Owners, Architects and Engineers.

Patrick will also direct his energies to organizing, scheduling, planning, motivating, controlling and completing the building program. He bears the responsibility for getting the project completed to the satisfaction of Hallsville R-IV School District and within the time set forth in the contract.

PROJECT RESPONSIBILITY

Project Manager

EDUCATION

Bachelor of Interdisciplinary Studies, Arizona State University

CERTIFICATIONS

LEED Green Associate

OSHA 10 Hour Construction Safety and Health for Construction Industry

CONSTRUCTION EXPERIENCE

12 Years

RELEVANT PROJECTS

Zeta Tau Alpha

Replacement House
Columbus, OH
\$6,581,000

Arizona State University

Sun Devil Stadium Renovation
Tempe, AZ
\$35,000,000

Mayo Clinic

Proton Therapy Facility
Phoenix, AZ
\$70,000,000

Phoenix Sky Harbor

450,000 SF Terminal 3
Modernization
Phoenix, AZ
\$560,000,000

Hotel Palomar Cityscape

256,000 SF Boutique Hotel
Phoenix, AZ
\$90,000,000

NOTABLE



Occupied Campus Expert



Education Experience



Sustainability Expertise - LEED Green Associate



Scheduling Expertise

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ARTICLE 1 GENERAL PROVISIONS

§ 1.1 The Contract Documents

The Contract Documents consist of this Agreement, Conditions of the Contract (General, Supplementary and other Conditions), Drawings, Specifications, Addenda issued prior to the execution of this Agreement, other documents listed in this Agreement, and Modifications issued after execution of this Agreement, all of which form the Contract and are as fully a part of the Contract as if attached to this Agreement or repeated herein. Upon the Owner's acceptance of the Construction Manager's Guaranteed Maximum Price proposal, the Contract Documents will also include the documents described in Section 2.2.3 and identified in the Guaranteed Maximum Price Amendment and revisions prepared by the Architect and furnished by the Owner as described in Section 2.2.8. The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations or agreements, either written or oral. If anything in the other Contract Documents, other than a Modification, is inconsistent with this Agreement, this Agreement shall govern.

§ 1.2 Relationship of the Parties

The Construction Manager accepts the relationship of trust and confidence established by this Agreement and covenants with the Owner to cooperate with the Architect and exercise the Construction Manager's skill and judgment in furthering the interests of the Owner; to furnish efficient construction administration, management services and supervision; to furnish at all times an adequate supply of workers and materials; and to perform the Work in an expeditious and economical manner consistent with the Owner's ~~interests~~ interests and in compliance with all applicable laws, codes, regulations, ordinances and requirements including without limitation the requirements set forth in RSMo. 67-5050. The Owner agrees to furnish or approve, in a timely manner, information required by the Construction Manager and to make payments to the Construction Manager in accordance with the requirements of the Contract Documents.

§ 1.3 General Conditions

For the Preconstruction Phase, AIA Document A201™-2007, General Conditions of the Contract for Construction, shall apply only as specifically provided in this Agreement. For the Construction Phase, the general conditions of the contract shall be as set forth in A201-2007, which document is incorporated herein by reference. ~~The term "Contractor"~~ All references in this Agreement to A201-2007 shall mean as modified by the Owner and Construction Manager. The term Contractor as used in A201-2007 shall mean the Construction Manager.

ARTICLE 2 CONSTRUCTION MANAGER'S RESPONSIBILITIES

The Construction Manager's Preconstruction Phase responsibilities are set forth in Sections 2.1 and 2.2. The Construction Manager's Construction Phase responsibilities are set forth in Section 2.3. The Owner and Construction Manager may ~~agree~~ agree in writing, in consultation with the Architect, for the Construction Phase to commence prior to completion of the Preconstruction Phase, in which case, both phases will proceed concurrently. The Construction Manager shall identify a representative authorized to act on behalf of the Construction Manager with respect to ~~the Project~~ the Project, who is Kort Cole. The Construction Manager also designates the following as its key personnel:

Steve Platt and Richard Graves. The Construction Manager shall not change its authorized representative or any key personnel who have similar qualifications and experience as the original personnel and who are satisfactory to Owner in its reasonable discretion.

§ 2.1 Preconstruction Phase

§ 2.1.1 The Construction Manager shall provide a preliminary evaluation of the Owner's program, schedule and construction budget requirements, each in terms of the other.

§ 2.1.2 Consultation

The Construction Manager shall schedule and conduct meetings with the Architect and Owner to discuss such matters as procedures, progress, coordination, and scheduling of the Work. The Construction Manager shall advise the Owner and the Architect on proposed site use and improvements, selection of materials, and building systems and equipment. The Construction Manager shall also provide recommendations consistent with the Project requirements to the Owner and Architect on constructability; availability of materials and labor; time requirements for procurement, installation and construction; and factors related to construction cost including, but not limited to, costs of alternative designs or materials, preliminary budgets, life-cycle data, and possible cost reductions.

§ 2.1.2.1 Design Reviews: The Construction Manager shall make recommendations to the Owner with respect to the use of the selection of materials, Project systems and equipment and other aspects of the physical construction of the Project; and make recommendations or comparisons on various construction methods, the availability of materials and labor, time requirements for procuring long-lead items, installation and construction, including costs and construction time associated with alternative designs or materials, the Budget and constructability. The review of proposed building systems, materials and equipment for appropriateness as contemplated by this Section will be accomplished by Construction Manager from the perspective of a construction manager for the Project. In no event shall Construction Manager be deemed to be performing, or be required to perform, any design or engineering in connection with the Project.

§ 2.1.2.2 Recommendations Regarding Investigations: The Construction Manager shall recommend to the Owner which investigations, surveys, tests, analyses and reports be obtained as necessary to document existing conditions for the proper execution of the Work. While Construction Manager will make recommendations to the Owner from time to time pursuant to this Section, Construction Manager's original scope of the Work and its GMP do not include Construction Manager hiring any person or entity to perform such investigations, surveys, tests, analyses or reports as contemplated by this Section.

§ 2.1.2.3 Permitting: The Construction Manager shall assist the Owner in obtaining the necessary approvals for the Project, and shall obtain all necessary permits and licenses for the construction of the Project.

§ 2.1.2.4 Variance Assistance: The Construction Manager shall assist the Owner and Architect, when requested, by providing information for the preparation and submission of applications or other documents necessary for the issuance of any variances or approvals required in connection with the design or construction of the Project from any local, state, or federal governmental authorities having jurisdiction over the Project.

§ 2.1.2.5 Construction Documents Complete: The Construction Manager shall review the Drawings and Specifications for the Project and shall notify the Owner and the Architect if the Construction Manager believes the responsibilities of the Construction Manager are not properly identified or assigned, or if the Drawings and Specifications contain any areas of conflict and/or overlap in the Work to be performed by the Construction Manager and/or the various subcontractors on the Project. Construction Manager is not qualified to perform, and shall not be required to perform, an architectural, engineering or other design review or to perform or provide any architectural, engineering or other professional services satisfying the standards of a design professional. Nothing within the Contract Documents shall be construed as requiring Construction Manager to furnish, provide or perform architectural services, professional engineering services, land surveying services or any other services of the type which would require Construction Manager to obtain and maintain a professional registration in the state where the work is performed. In ascertaining whether the scope of work set forth in the Construction Documents is suitable for the purposes of bidding and construction as provided in section 2.1.2.1 of the Agreement, Construction Manager will make that determination in its role as construction manager and will not perform a design review of the type performed by an architect, professional engineer or other licensed design professional.

§ 2.1.3 When Project requirements in Section 3.1.1 have been sufficiently identified, the Construction Manager shall prepare and periodically update a Project schedule for the Architect's review and the Owner's acceptance. The Construction Manager shall ~~obtain the Architect's approval for the portion of the Project schedule relating to the~~

V. Financial & Budget Update:

Financial Narrative:

The 100% design development documents are currently being reviewed to provide an updated cost opinion by S. M. Wilson & Co. This review process is utilizing both historical pricing along with some limited subcontractor market input to assure that the most representative costs have been assessed against the current project design.

During this cost review process, Klinger & Associates, P.C. and S. M. Wilson & Co. have been collaborating to make sure that the prepared cost opinion is in line with the overall intent of the design development documents. As is to be expected during this process, there have been some estimated costs that have changed from what was initially anticipated and included at the schematic design level. During this collaboration it has been determined that the progression of the project documents may be trending toward anticipated costs that would exceed the overall 7.2 million dollar budget constraints for the program. This discovery has extended the review process beyond what was originally anticipated and both entities are continuing working toward a deliverable of 100% design development costs to be presented at a special board meeting. In this meeting it is expected to review the current cost opinion and recommended design direction to maintain the overall program budget.

We are requesting that a special board meeting be scheduled for April 22, 2019 or April 23, 2019 in order to present and review the 100% design development cost opinion and subsequent design recommendations which will allow Klinger & Associates, P.C. to proceed into final construction documents.

Overall Cost Report:

This section of the report will be used to provide the most updated financial report on the project costs.

Monthly Construction Pay Request:

This section of the report will be used in the future to include the monthly construction pay application for review and processing by the school district for activities completed through the previous month. Pay requests presented in this report will have already been certified by Klinger & Associates, P.C. as required by contractual terms.

VI. Project Schedule Update:

Project Schedule Narrative:

While the cost opinion of the 100% design development documents is taking longer to fully vet than originally anticipated, we do not believe that this will affect the overall anticipated project completion. With direction provided to the design team on the construction documents by April 23, 2019, we would project completion of the construction documents by the end of May for bidding to the subcontracts during the month of June. This will allow construction to mobilize and begin in July. With construction activities proceeding in July of 2019, we do not anticipate any concerns with the completion of this project as needed to accommodate the needs of the 2020-2021 school year.

Project Milestone Activities:

S. M. Wilson & Co. will continually update upcoming milestones and activities to keep the school district informed of anticipated activities as the project progresses. The milestone events below could change as the project develops and are being presented for general information of what is currently anticipated.

Completed Milestone Activities:

- Design Team Contracted (9/17/2018)
- Construction Manager Contracted (10/15/2018)
- Schematic Design Documents Issued (11/2/2018)
- Schematic Design Cost Opinion Review & Direction from Board (12/12/2018)
- Updated Schematic Design Documents Review & Board Approval for Continuation with Design Development Documents (1/24/2019)
- 100% Design Development Documents Issued (issued on 3/4/2019)

Anticipated Milestone Activities:

- DD Cost Opinion Presentation, Review & Board Approval for Continuation with Construction Documents (April 22-23, 2019)
- Subcontractor Outreach Meeting (Early May 2019)
- Completion of Construction Documents (End of May 2019)
- Subcontractor Bidding (June 2019)
- Subcontractor Pre-Bid Meeting (Mid-June 2019)
- Subcontractor Bid Review & GMP Preparation (Early July 2019)
- Construction Crews Mobilize on Site (July 2019)

- Project Completion (July 2020)
- 2020-2021 School Year Begins (Mid-August 2020)

Monthly Project Schedule Update:

This section will include a copy of the updated project construction schedule which will be published every month as part of this report. The overall anticipated construction schedule is currently being updated with information provided in the 100% design development documents and will be published with the next progress report.

VII. Construction Activity Update & Photos:

Construction Activities Narrative:

There will be an exploratory excavation done near the proposed gymnasium expansion to locate and identify exiting utilities in this area so that final construction documents can be prepared to accurately represent what needs to be done in this area. This excavation is scheduled for April 15, 2019 as weather allows. The findings of this exploratory effort will be documented by the design team.

Once construction begins, this section will be used to provide a brief update on construction activities for the month as well as anticipated construction activities for the upcoming month.

Construction Activity Photos:

As construction begins and progresses, this section of the report will be used to provide some representative pictures of the construction progress for the month covered by the corresponding report.

VIII. Board Action Items & Approval of Progress Report #1:

Board of Education Action Items:

1. We are hereby requesting approval of Change Order Request 1 (COR 1) for the change of project manager to Patrick Aylesworth as part of the approval of this report.
2. We are hereby requesting a special board meeting be scheduled for either April 22, 2019 or April 23, 2019 in order to review and discuss the 100% design development cost opinion and provide design direction to the architect to proceed with 100% construction documents.

Hallsville District Administrative Team and Construction Manager request approval of Progress Report #1 and action items noted above, as presented and as further discussed at the April 15, 2019 School Board Meeting.