
Waterville-Elysian-Morristown Public Schools



Waterville-Elysian-Morristown
School District #2143

Proposal For
Construction Management Services
12/5/18



“right from the start”



Waterville-Elysian-Morristown
School District #2143

WATERVILLE-ELYSIAN-MORRISTOWN PUBLIC SCHOOLS

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www.ramorton.com

December 5, 2018

Mr. Joel Whitehurst, Superintendent
Waterville-Elysian-Morristown Public Schools
ISD #2143
500 East Paquin Street
Waterville, MN 56096

Thank you for the opportunity to introduce our agency planning & management company. Our company has significant success working with public school districts over the last thirty-five years. R.A. Morton has built a very strong reputation for pre-referendum, pre-construction and construction management services. This is what makes R.A. Morton unique. We are able to bring all of the skills and experience together for a seamless transition through the different phases of this process. Pre-Referendum Planning, Facility Planning and Management services represent 100% of our total volume, acting full-time agents of our clients.

We are the planning and construction partner that will help Waterville-Elysian-Morristown Public Schools better understand and define the building process and optimize the experience with:

- Guidance from **concept through completion**.
- Collaboration **across all project stakeholders**: School District, R.A. Morton, architects, engineers, financial consultants, government officials and contractors.
- Trust and Integrity **to represent your best interests without conflict of interest**.
- Flexibility from a **proven methodology** that provides the **owner with more control** in the planning and building process.
- Experience and Accountability with **extensive experience** in helping mitigate project risks.

Construction Management Experience

You will find our school experience is heavily weighted to projects that are very similar for Districts like Waterville-Elysian-Morristown. **In essence**, all of our school experience has focused on providing superior customer service. Our commitment is to **facilitate and manage the project to your objectives** including procedures as they relate to **budget, schedule and quality**. We are the experts for your project.

Sincerely,

A handwritten signature in black ink that reads 'Preston Euerle'.

Preston Euerle
President/CEO



EXECUTIVE SUMMARY - UNIQUE QUALIFICATIONS

Every project is unique. Acknowledging this is a key to our success and getting every project **“Right from the Start”** is our primary focus to serve Waterville-Elysian-Morrissett Public Schools. Our major strengths and qualifications are very strong and simply stated:

1. SAFETY COMES FIRST

Public education is our focus. We understand the importance of managing construction activity in and around occupied school buildings. The **safety of students, staff, community members and construction crews** is a top priority.

2. TEAM BUILDING PROCESS

We are excited to assemble our team and collaborate with the right collection of independent consultants (Architects, Engineers, Financial Consultants, Educational Consultants, etc.). This provides a **healthy checks and balance process**, one the community will feel they are getting proper representation.

3. AGENCY CONSTRUCTION MANAGEMENT EXPERIENCE

Our experience and agency construction management approach for Public Education has been extremely successful. Every project we have completed has utilized this delivery method including a fixed fee arrangement and the AIA series documents. Operating under the agency approach ensures the District's objectives are fulfilled.

Every project we have managed has been delivered **at or under the established budget**. Many Districts have been able to expand their project with funds available from good bid results or unused contingency. The budget is set and the **project has to be managed to that budget**. There will be no opportunities to expend more than the budget.

4. LOCAL FOCUS

This is an important community based project. Our aggressive and comprehensive bid process enables all qualified local contractors and general contractors and suppliers the opportunity to bid and be part of this project. A local opportunity for contractors is not only good community stewardship, but also **returns better bid results**. Because we are thorough, fair and aggressive, we receive the most competitive bids in the marketplace.

5. QUALITY, VALUE AND PROJECT COST SAVINGS

The cost value we create through our services more than offsets the cost of our services. Our services are not an added cost to the project. We detail our fee for services as a separate line item in the project budget and therefore do not collect a percentage of project cost for overhead and profit for fee enhancement as does a general contractor.



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6. TRANSPARENCY OF INFORMATION AND FULL DISCLOSURE POLICY

Informed decisions are only possible if you have the information available. We would like to stress, this is an open book process. All information, including meeting notes and **summaries are available to Administration and School Board at all times. We are an extension of your District** and want you to feel comfortable with the process.

We provide direct and honest communication without fail. Direct honesty is the single most important factor in building relationships with all of the stakeholders of this project. **We are your representative and agent.**

7. MORE THAN JUST A COMPLETED PROJECT

Our focus is to create long-term relationships. As your agent, our relationship extends well beyond the end of the project. We are excited to serve Waterville-Elysian-Morristown Public Schools by providing a high degree of **quality and value** through our efforts. Our success will be graded by your willingness to recommend us for future projects or to other clients. This is evident by the **willingness of past customers to refer us for other projects.**

Thank you again for this opportunity. We understand how important it is to select the right team for this process. Our interests go well beyond the typical relationship between our organizations. We will ensure that you are getting the **"Right from the Start"** solution to your educational needs.

FIRM PROFILE

Company Name: **R.A. Morton & Associates, Inc.**
 Address: **3315 Roosevelt Road, Suite 100
 St. Cloud, MN 56301**
 Phone: **(320) 251-0262**
 Fax: **(320) 251-5749**
 Contact: **Preston Euerle, CEO/President**
 Email: **prestone@ramorton.com**
 Website: **www.ramorton.com**
 Date of Incorporation: **December 1982 in Minnesota**



PROFESSIONAL CONSTRUCTION MANAGEMENT

R.A. Morton & Associates, Inc. is an agency construction management firm founded in 1982. Management and Owner’s Representative, Facility Analysis/Pre-Referendum services represent 100% of our total construction volume, acting as full-time agents of our clients. We have an excellent track record working with clients in the PK-12 Public Education. In the past 5 years, 70% of our total construction volume managed was PK-12 educational facility projects.

DISTRICT'S REPRESENTATIVE AND AGENT

As the District’s representative and agent, our staff becomes an extension of the District’s staff. Our role is to serve the District to complete the detailed Scope of Service and your staff can stay focused on their educational duties.

THE R.A. MORTON TEAM SERVICES

Our Team recommends the most efficient way to deliver quality customer service is to maintain an agency relationship as an extension of District staff. We do not provide in-house architectural, engineering or contracting services, eliminating any potential conflict of interest. This recommended teaming approach allows you to establish a project team of independent and qualified firms that focus on their individual strengths and provide a healthy checks and balances.

All personnel are assigned to full time management activities. We have all the pieces to deliver services right from the start through the construction timing. Our principal and project team are ready to support Waterville-Elysian-Morristown Public Schools.

OTHER SERVICES BESIDE PROFESSIONAL CONSTRUCTION MANAGEMENT

Construction Cost Estimating

R.A. Morton also provides construction cost estimating as a service to architectural and engineering design firms. A typical component of the request for proposals for design is to have a Cost Estimating Consultant as part of their proposal. The key element for the design proposer is that the estimating consultant must be a separate entity from the design firm. We have filled this capacity for many architectural and engineering design teams.



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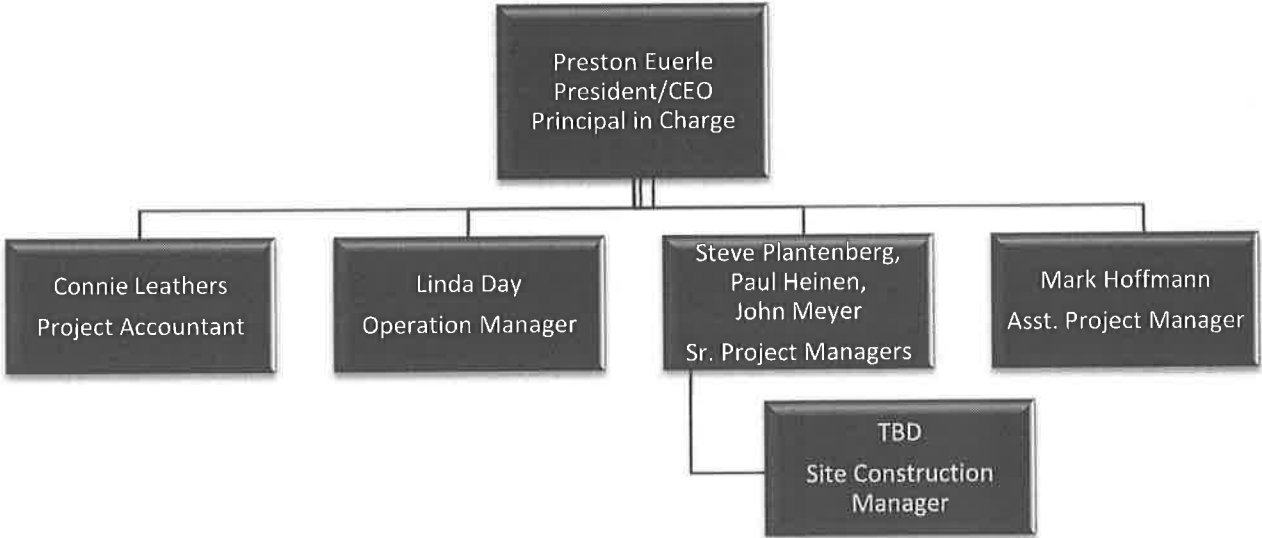
PROFESSIONAL ORGANIZATION

The personnel in the office that will be handling your project are:

- Principal in Charge / President / CEO: **Preston Euerle**
- Senior Project Managers / Cost Estimator / Value Engineering: **Steve Plantenberg, Paul Heinen, John Meyer**
- Assistant Project Manager: **Mark Hoffmann**
- Site Construction Manager/Superintendent: **TBD**
- Administrative / Accounting / Resource Personnel: **Linda Day and Connie Leathers**

Our Site Construction Managers are based from the project job site and are at the project on a full-time basis during the scheduled construction workday. **As your agent, our Site Construction Manager effectively becomes an extension of the District's staff during the project with the experience to efficiently manage the day-to-day requirements of the project.** All project information is available to the Site Construction Manager at the project job site.

TEAM MATRIX
WATERVILLE-ELYSIAN-MORRISTOWN PUBLIC



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KEY TEAM MEMBERS



PRESTON EUERLE | President/CEO/Principal-in-Charge

Preston grew up on a farm in Litchfield, MN. He is a graduate of Gustavus Adolphus College, St. Peter, MN with a BA in Administrative Management and Education. Preston and his wife, Linda, reside in Clearwater and have three children. He has been actively involved with St. Cloud area youth Baseball and Basketball programs as an in-house program and travel team coach and is involved in the St. Cloud Area Chamber, Central Minnesota Youth for Christ, St. Cloud Economic Development Board and Miracle League.

Experience/Project Responsibility:

Preston had 14 years of management at Herberger’s Department stores and became the Vice President of Merchandising prior to joining R.A. Morton in 2000. He has been the Principal-in-Charge for all projects since 2001. He facilitates the pre-referendum process and oversees the pre-construction planning and the construction phases. Upon completion of project, Preston will lead the post-construction warranty work.

Relevant Experience:

Kenyon-Wanamingo Public Schools
 Brooklyn Center Public Schools
 Detroit Lakes Public Schools
 Willow River Public Schools
 Renville County West Public Schools
 Cedar Mountain Public Schools
 ROCORI Public Schools
 Hawley Public Schools
 Mesabi East Public Schools
 Alexandria Public Schools
 Le Sueur-Henderson Public Schools

Murray County Central Public Schools
 Willmar Public Schools
 Barnesville Public Schools
 Sibley East Public Schools
 Underwood Public Schools
 Lakeview Public Schools
 Verndale Public Schools
 Fergus Falls Public Schools
 Pierz Public Schools
 Chatfield Public Schools
 Tri-City United Public Schools



MARK HOFFMANN Assistant Project Manager

About Mark: Mark joined the R.A. Morton team in 2004. Prior to joining our team, he had 6 years of experience in the construction trades and 7 years in Geological trade services. Mark has a Master of Science Degree from the University of Idaho. Mark currently resides in Albany, MN with his wife Carmen and two children.

Experience/Project Responsibility:

Mark has been a Site Construction Manager for various projects throughout Minnesota, directing all phases of construction projects from planning to completion. Mark’s responsibilities as an assistant project manager include assisting the project manager from the pre-construction through post-construction phases including cost estimating, scheduling, bid solicitation, change order processing and contractor submittals.

Relevant Experience:

Sibley East Public Schools
 Detroit Lakes Public Schools
 Lyle Public Schools
 Pipestone Public Schools*

Kenyon-Wanamingo Public Schools
 Hawley Public Schools
 Chatfield Public Schools
 Bertha-Hewitt Public Schools*

Note: *Project Experience with Previous Firm



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STEVE PLANTENBERG | Sr. Project Manager/Cost Estimator/Value Engineering

Steve and his wife Laura have resided in Avon for the past 31 years where they raised their two children. Steve served five years on the Avon Township Planning Board in which he served as the Board Chairman. As a member of the board, Steve facilitated the Township's land assessment and inventory program with residents, coordinated the development of the Township's land use plan and zoning map, and was a strong voice in various key decisions for the community.

Experience/Project Responsibility:

Steve had 22 years in the construction-planning environment as a Corporate Planner for G.R. Herberger's Inc. and Project Manager for 6 years at an established general contractor prior to joining R.A. Morton in 2005. His primary focus was post-secondary education projects

Steve is able to combine years of planning, facilitation and estimating skills to assist the client in making informed project decisions. He is an integral team member providing estimates and quality control from concept to completion. His experience has given him the understanding of construction projects along with the need to address and solve challenges throughout the process.

Relevant Experience:

- | | |
|-------------------------------------------------------|-------------------------------------------------|
| Kenyon-Wanamingo Public Schools | Willmar Public Schools |
| Brooklyn Center Public Schools | Fergus Falls Ice Arena |
| ROCORI Public Schools | Fergus Falls Track and Field Turf |
| Sibley East Public Schools | Fergus Falls Public Schools (Multiple Projects) |
| Cedar Mountain Public Schools | Underwood Public Schools |
| Detroit Lakes Public Schools, Pre-referendum planning | |



PAUL HEINEN Senior Project Manager/Cost Estimator/Value Engineer

About Paul: Paul grew up in Albany, Minnesota and is a graduate of Albany High School. He attended Bemidji State University and is a graduate of St. Cloud State University with a Bachelor of Science Industrial Studies/Construction Emphasis Degree. Paul and his wife, Karen have two children and reside in St. Cloud.

Experience/Project Responsibility:

Paul had 3 years in Commercial Construction prior to joining R.A. Morton in 1989. Paul has been the project manager for numerous projects in Minnesota. Paul will be working with you from pre-construction to the final punch list. Responsibilities include project development, understanding/meeting owner expectations; detailed project cost estimating, plan review and bid solicitation. During construction, Paul works with on-site quality control, cost control, schedule control, change order coordination, construction meetings, draw preparation/cost control, provides checks and balances with field personnel, follows through on all project details and oversees the Safety Program.

Relevant Experience:

- | | |
|------------------------------------|-------------------------------------|
| Brooklyn Center Public Schools | Chatfield Public Schools |
| Willow River Public Schools | Renville County West Public Schools |
| Dover – Eyota Public Schools | Tri-City United Public Schools |
| Mesabi East Public Schools | Alexandria Public Schools |
| Le Sueur-Henderson Public Schools | Osakis Public Schools |
| Eden Valley/Watkins Public Schools | Cleveland Public Schools |



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JOHN MEYER Senior Project Manager/Estimator

About John: *John grew up in St. Joseph, Minnesota and is a graduate of St. Cloud Apollo High School. After high school, John worked in the construction trades. John and his wife, Susan, reside in St. Cloud.*

Experience/Project Responsibility:

John had 40 years in the Construction trades including operating his own construction company prior to joining R.A. Morton in 2015. John has managed numerous projects in Minnesota. John will be working with you from pre-construction estimates to the final punch list. Responsibilities include project development, understanding/meeting owner expectations; detailed project cost estimating, plan review and bid solicitation. During construction, John works with on-site quality control, cost control, schedule control, change order coordination, construction meetings, draw preparation/cost control, provides checks and balances with field personnel, follows through on all project details and oversees the Safety Program.

Relevant Experience:

Murray County Central Public Schools
 St. Cloud Public Schools – Quarryview Education Center
 Detroit Lakes Public Schools
 Pierz Public Schools
 Foley Public Schools

PROJECT EXPERIENCE

WHY R.A. MORTON

The following pages will outline our experience with K-12 Public School Districts. Our complete focus is to manage the project to your objectives including procedures as it relates to safety, budget, schedule and quality. We are the construction management experts for your project. As your Agency Construction Management experts, we will collaborate with the architect and engineers as part of the project team.

PUBLIC SCHOOL DISTRICTS THAT HAVE RETAINED OUR FIRM FOR CONSTRUCTION MANAGEMENT SERVICES

Elementary	Middle School	High School	PK-12
Willmar Lakeland	Willmar	Willmar	Willow River
Montgomery/Lonsdale	Montgomery/Lonsdale	Montgomery/Lonsdale	Lyle
ROCORI	ROCORI	ROCORI	Goodhue
Chatfield	Chatfield	Chatfield	Osakis
LeSueur/Henderson	LeSueur/Henderson	LeSueur/Henderson	Verndale
Fergus Falls	Fergus Falls	Fergus Falls	Mesabi East
Pierz	Pierz	Pierz	Lakeview
Alexandria	Alexandria	Annandale	Underwood
Maple River	Maple River	Clinton/Graceville	Renville Cty W.
Dassel/Cokato	Dassel/Cokato	Eden Valley/Watkins	
Clinton/Graceville	Paynesville	Hawley	
Eden Valley/Watkins	Litchfield	Cedar Mountain	
Cedar Mountain	Detroit Lakes	Detroit Lakes	
Dover Eyota		Sibley East/Arlington	
Hawley			
Sibley East/Gaylord			
St. Cloud Quarryview			

Districts that have retained our firm more than once are shown in **BOLD**

SIMILAR SCHOOL PROJECTS – SEE PROJECT CASE STUDIES AT END OF PROPOSAL

These projects are very similar in scope with extensive mechanical upgrades.

Willow River Public School
 Hawley Public Schools
 Cedar Mountain Public Schools
 Sibley East Public Schools – Middle School/High School

RECENT SCHOOL PROJECTS**NEW LAKELAND ELEMENTARY SCHOOL – WILLMAR PUBLIC SCHOOLS**

Completion – December 2017

Architect – ARY

Project Budget - \$23.8M

Final Cost - \$23.1M

Jeffery Holm, Superintendent

611 5th Street SW, Willmar, MN 56201

Bus: (320) 231-8510 E-mail: holmj@willmar.k12.mn.us

NEW GAYLORD ELEMENTARY SCHOOL – SIBLEY EAST PUBLIC SCHOOLS

Completion – August 2017

Architect – WENDEL

Project Budget - \$18.5

Final Cost – \$18.1M

Jim Amsden, Superintendent

202 3rd Avenue NW, Arlington, MN 55307

Bus: (507) 964-8224 E-mail: Jamsden@sibley-east.k12.mn.us

MIDDLE/HIGH SCHOOL ADDITIONS/REMODEL– SIBLEY EAST PUBLIC SCHOOLS

Completion – August 2018

Architect – WENDEL

Project Budget - \$24.6M

Final Cost – \$24.6M

Jim Amsden, Superintendent

202 3rd Avenue NW, Arlington, MN 55307

Bus: (507) 964-8224 E-mail: Jamsden@sibley-east.k12.mn.us

NEW QUARRYVIEW EARLY CHILDHOOD EDUCATION CENTER – ST. CLOUD PUBLIC SCHOOLS

Completion – August 2018

Architect - MILLER

Project Budget – \$14.8M

Final Cost - \$14.6M

Willie Jett, Superintendent

1201 S. Second Street, Waite Park, MN 56387

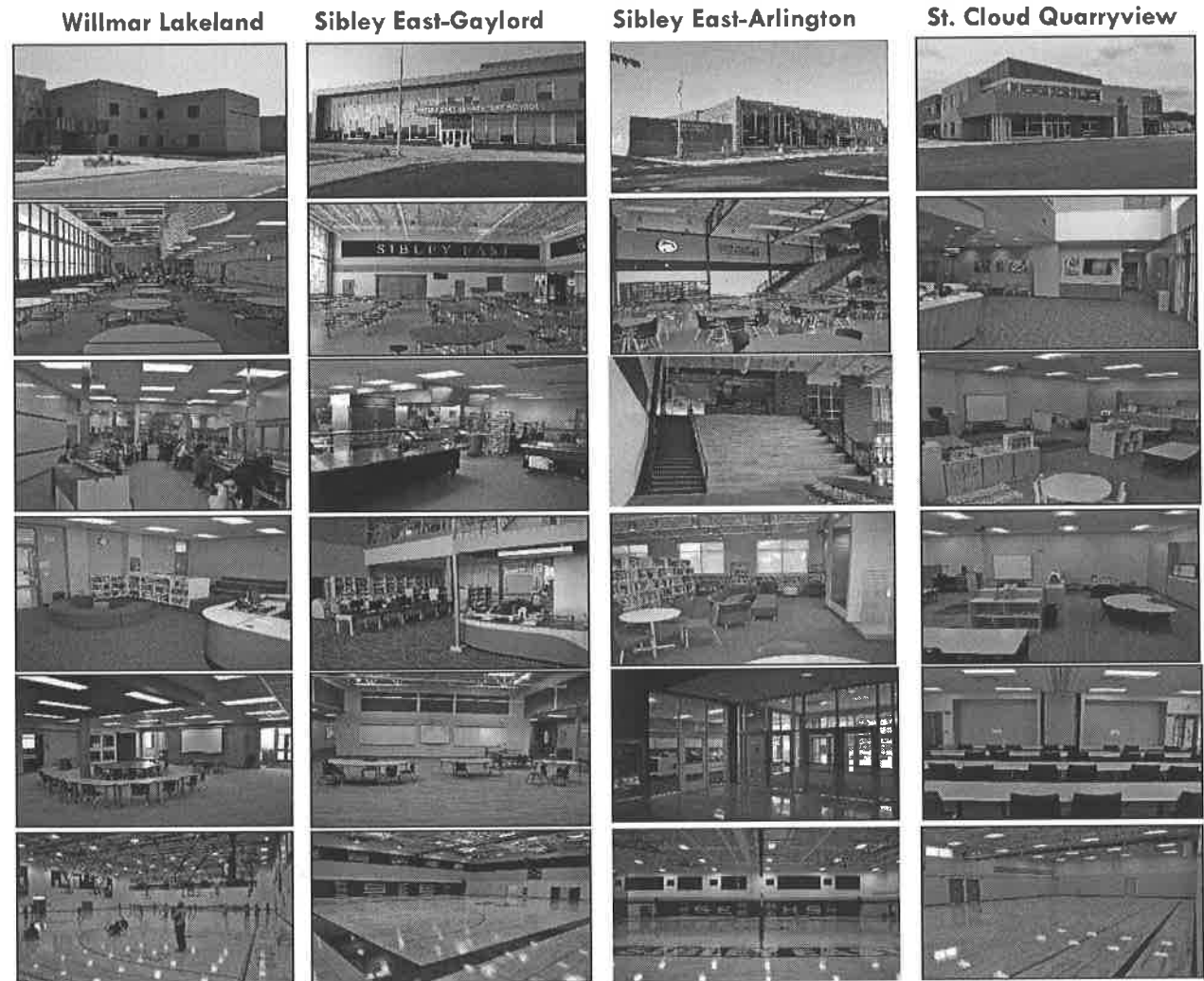
Bus: (320) 253-9333 E-mail: willie.jett@isd742.org

Mike Spanier – District Owners Representative

Cell: (320) 267-6195 E-Mail: mike.spanier@isd742.org

SEE OTHER CONSIDERATIONS TAB FOR PROJECT CASE STUDY INFORMATION

PROJECT UNDERSTANDING – Relevant Experience



ARCHITECTURAL FIRMS WE HAVE WORKED WITH

- ARY
- Wendel
- TSP
- ISG
- WOLD
- ATS&R
- GLT
- Miller
- MLA
- HMA
- WSN
- Zerr Berg



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SCOPE OF SERVICES

Pre-Construction	Provide/Prepare	Review	Assist	Advise/Consult	Monitor/Endeavor
Design and Documents Phase - Pre-Bid, Bid and Award Phase					
Review the program furnished by the Owner and any evaluation of the Owner's program provided by the Architect.		X			
Provide a preliminary evaluation of the Owner's program, schedule and construction budget requirements.	X				
Prepare a written Construction Management Plan that includes, at a minimum, the following: (1) preliminary program evaluation, (2) Project schedule, (3) Cost estimates, (4) Recommendations for Project delivery method, and (5) Contractors' scopes of Work.	X				
Prepare preliminary estimates of the Cost of the Work or the cost of program requirements.	X				
Review design documents during their development and advise on proposed site use and improvements, selection of materials, and building systems and equipment.		X			
Provide recommendations on constructability, availability of materials and labor, sequencing for phased construction, 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.	X				
Prepare and periodically update the Project schedule including an update from the Architect for those services.	X				
Prepare and update estimates of the Cost of the Work as design progresses in detail and refinement and include appropriate contingencies for design, bidding or negotiating, price escalation and market conditions.	X				
Advise the Owner and Architect if it appears that the Cost of the Work may exceed the Owner's budget and make recommendations for corrective action.				X	
Consult with the Owner and Architect as plans progress to make recommendations that design details adversely affect constructability, cost or schedules.	X			X	
Provide recommendations and information regarding the assignment of responsibilities for temporary Project facilities and equipment, materials and services for common use of the Contractors.	X				
Provide recommendations on the division of the Project into individual Contracts for the construction of various categories of Work.	X				
Review the Drawings and Specifications and make recommendations as required to provide that (1) the Work of the Contractors is coordinated, (2) all requirements for the Project are assigned to the appropriate Contract, (3) the likelihood of jurisdictional disputes is minimized, and (4) proper coordination is provided for phased construction.	X	X			
Update the Project schedule to include the components of the Work, including phasing of construction and delivery of products.	X				
Expedite and coordinate the ordering and delivery of materials, including those that must be ordered well in advance of construction.					X
Assist the Owner in selecting, retaining and coordinating the professional services of surveyors, special consultants and testing laboratories required for the Project.			X		
Provide an analysis of the types and quantities of labor required for the Project.	X				
Make recommendations for actions designed to minimize adverse effects of labor shortages.				X	
Assist the Owner in obtaining information regarding applicable requirements for equal employment opportunity programs, and other programs as may be required by governmental authorities.			X		
Upon approval of the Drawings and Specifications, update and submit the latest estimate of the Cost of the Work and the Project schedule.	X				
Submit the list of prospective bidders for review and the Owner's approval.	X				
Develop bidders' interest in the Project and establish bidding schedules.	X				
With the assistance of the Architect, issue bidding documents to bidders and conduct pre-bid conferences with prospective bidders, including the current Project schedule with each set of bidding documents.	X		X		
Assist the Architect with regard to questions from bidders and with the issuance of addenda.			X		
Receive bids, prepare bid analyses and make recommendations to the Owner for the award of Contracts or rejection of bids.	X				
Assist the Owner in preparing Construction Contracts and advise the Owner on the acceptability of Subcontractors and material suppliers proposed by Multiple Prime Contractors.	X		X		
Assist the Owner in obtaining building permits and special permits for permanent improvements, except for permits required to be obtained directly by the various Multiple Prime Contractors.			X		
Verify that the Owner has paid applicable fees and assessments.					X
Assist the Owner and Architect in connection with the Owner's responsibility for filing documents required for the approvals of governmental authorities having jurisdiction over the Project.			X		



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Construction and Post Construction Phase	Provide/Prepare	Review	Assist	Advise/Consult	Monitor/Endeavor
Provide a staffing plan to include one or more representatives who shall be in attendance at the Project site whenever the Work is being performed.	X				
Provide on-site administration of the Contracts for Construction in cooperation with the Architect.	X				
Coordinate the activities of the Multiple Prime Contractors in accordance with the latest approved Project schedule and the Contract Documents.					X
Update the Project schedule, incorporating the activities of the Owner, Architect, and Multiple Prime Contractors on the Project including the Owner's occupancy requirements.	X				
Update and reissue the Project schedule as required to show current conditions. If an update indicates that the previously approved Project schedule may not be met, recommend corrective action, if any, to the Owner and Architect.	X				
Schedule and conduct meetings to discuss such matters as procedures, progress, coordination, and scheduling of the Work including the preparation and prompt distribution of minutes to the Owner, Architect and Multiple Prime Contractors.	X				
Schedule and coordinate the sequence of construction and assignment of space in areas where the Multiple Prime Contractors are performing Work, in accordance with the Contract Documents and the latest approved Project schedule.					X
Schedule all tests and inspections required by the Contract Documents or governmental authorities, and arrange for the delivery of test and inspection reports to the Owner and Architect.					X
Endeavor to obtain satisfactory performance from each of the Multiple Prime Contractors and recommend courses of action to the Owner when requirements of a Contract are not being fulfilled.					X
Monitor and evaluate actual costs for activities in progress and estimates for uncompleted tasks and advise the Owner and Architect as to variances between actual and budgeted or estimated costs and shall promptly notify the Contractor if there are any inconsistencies or inaccuracies in the information presented.	X				
Develop cash flow reports and forecasts for the Project.	X				
Maintain accounting records on authorized Work performed.	X				
On a monthly basis, review the payment Applications due the respective Contractors and prepare a Project Application and Certificate for Payment summary.	X				
Provide Owner with full or partial lien waivers as applicable, or other evidence reasonably acceptable to Owner evidencing payment for supplied materials and services.	X				
Review the safety programs developed by each of the Multiple Prime Contractors.		X			
Determine in general that the Work of each Contractor is being performed in accordance with the requirements of the Contract Documents and notify the Owner, Contractor and Architect of defects and deficiencies in the Work.					X
Advise and consult with the Owner and Architect during the performance of its Construction Phase Services.				X	
Transmit to the Architect requests for interpretations and requests for information of the meaning and intent of the Drawings and Specifications with its written recommendation, and assist in the resolution of questions that may arise.	X		X		
Review requests for changes, assist in negotiating Contractors' proposals, submit recommendations to the Architect and Owner, and, if they are accepted, prepare Change Orders and Construction Change Directives that incorporate the Architect's modifications to the Contract Documents.	X	X			
Assist the Architect in the review, evaluation and documentation of Claims.			X		
Prepare, and revise as necessary, a Project submittal schedule incorporating information from the Owner, Owner's consultants, Owner's separate contractors and vendors, governmental agencies, and all other participants in the Project under the management of the Construction Manager.	X				
Review all Shop Drawings, Product Data, Samples and other submittals from the Multiple Prime Contractors and transmit to the Architect for approval.		X			
Keep a daily log containing a record of weather, each Contractor's Work on the site, number of workers, identification of equipment, Work accomplished, problems encountered, and other similar relevant data.	X				
Submit monthly written progress reports to the Owner and Architect, showing percentages of completion and other information as requested.	X				
Maintain at the site one copy of all Contracts, Drawings, Specifications, addenda, Change Orders, approved Shop Drawings, Product Data, Samples and other Modifications, in good order and marked currently to record all changes and selections made during construction. Deliver to the Owner upon completion of the project.	X				
Arrange for the delivery, storage, protection and security of Owner-purchased materials, systems and equipment that are a part of the Project until such items are incorporated into the Work.					X
With the Architect and the Owner's maintenance personnel, observe the Contractor's or Multiple Prime Contractors' final testing and start-up of utilities, operational systems and equipment and observe any commissioning as the Contract Documents may require.					X
Assist the Architect in preparing a list of incomplete or unsatisfactory items and a schedule for their completion and assist in conducting inspections to determine whether the Work or designated portion thereof is substantially complete.			X		
Prepare a Certificate of Substantial Completion and shall submit the executed Certificate to the Architect, Owner and Contractor.	X				
Evaluate the completion of the Work of the Multiple Prime Contractors and make recommendations to the Architect when Work is ready for final inspection. Assist the Architect in conducting final inspections.					X
Collect and forward to the Owner the following information received from the Multiple Prime Contractors: (1) certificates of insurance received from the Multiple Prime Contractors; (2) consent of surety or sureties, if any, to reduction in or partial release of retainage or the making of final payment; (3) affidavits, receipts, releases and waivers of liens or bonds indemnifying the Owner against liens; and (4) any other documentation required of the Contractor under the Contract Documents, including warranties and similar submittals.	X				
Deliver all keys, manuals, record drawings and maintenance stocks to the Owner.					X
Forward to the Architect a final Project Application for Payment upon the Contractor's compliance with the requirements of the Contract Documents.	X				
Conduct a meeting with the Owner to review the facility operations and performance prior to the expiration of one year from the date of Substantial Completion	X				



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ROLES AND RESPONSIBILITIES - CONSTRUCTION MANAGEMENT APPROACH

PHILOSOPHY AND APPROACH: *“right from the start”*

We believe that delivering a project has two distinct meanings.

First: By being **involved early** in the project, we have the greatest impact on the project’s understanding, schedule and budget. As your agent, our attention to detail and construction knowledge allows you to make informed decisions that benefit the project.

Second: Our approach enables the project to be **correct** from the beginning through construction.

A simple way to define our approach comes from the basic philosophies of the agency construction management delivery system. In essence, **our approach places us on the same side of the table as the District**, not the contractors. We become a member of the District’s team and are looking after your interests. The vast majority of R.A. Morton’s projects have been delivered under the Agency Construction Management delivery system. Our commitment to the Agency Construction Management method **allows the District to make informed decisions based on your objectives**.

Every project is unique. The key to delivering successful projects is turning challenges into opportunities. To accomplish this, we will evaluate all of the options and look for the best outcome per the given situation.

- Bringing the various stakeholders together (including District staff, Architects, Engineers, community representatives, consultants, etc.). Our open book communication format is a very important factor in building a consensus for all of the stakeholders.
- Creating an efficient team for checks and balances. Looking after the best interests of the District. We are excellent listeners who document and react to what is important to the community and the District.
- Finalizing the project scope. Providing diagnostic forecasting and other methods to determine the best value for your investment, not just estimates.
- Competitively bid each section of work to all qualified local and regional contractors. We do not compete with them and receive their best numbers.
- Coordinating the project phasing. We are very experienced in project scheduling and phasing to meet the timelines of the District. We understand that time is money for the project.
- Providing options based on Good/Better/Best scenarios that best serves the need for the community for today and the future.

All of the challenges become opportunities for us to display our talents to provide a unique service that meets the needs of Waterville-Elysian-Morristown Public Schools.

Similar project experience can be defined in a variety of ways. Building shell types, types of interior finishes, mechanical/electrical systems and technology components are all factors that are considered for related experience examples. Based on the elements provided in the project description, we have excellent experience in the facility type proposed.

TEAM APPROACH - RELATION TO THE ARCHITECT IN PREPARING PROJECT MANUAL

Preparation of the project manual is a team effort between the architects and our staff. We will diligently review project documents to ensure proper language is incorporated into the bid documents regarding construction procedures and job safety. This is a great time to eliminate gray areas that lead to change orders.

Our Team takes the lead in the upfront manual sections of general requirements and contract conditions. We support the architect in verifying bid sections and will work to make certain the identified scope of work takes advantage of services provided by local contractors. These efforts are made to eliminate potential levels of sub-bidders and additional markups.

In addition, by working with the architects and engineers, we are able to identify a procurement schedule to ensure the timely delivery of critical materials. These actions are taken to ensure productivity and reduce the overall schedule duration, making it possible to fast track your project. Working as a TEAM with the architects and engineers will ensure a qualified control estimate is established prior to bidding. In addition, we will work together, to formulate project alternates thus allowing Waterville-Elysian-Morristown Public Schools the flexibility to make informed decisions.

ESTIMATING TECHNIQUES-CONTROLLING PROJECT COSTS

Construction estimating, is it an exact science? We believe it is a combination of factors that rely heavily on experience and communication. As **80% of project costs are typically identified during the first 20% of the planning process**, the "Actualize" phase of our trademarked **GO process** is dedicated to presenting more than estimates. While most other firms provide estimates, we provide **ACTUALS**.

Our project management/estimating staff have field experience in the construction trades and understand how a facility is constructed from the foundations to the roofing material. In effect, the project is built in our minds and on paper before any work is started. It is also important to understand how the options of construction and material selections affect the project cost, including sustainable design. This is why we work very closely with the Architect and Engineers to **outline the options and materials early in the design phase** to get accurate and thorough master budget for this project.

We will communicate Good/Better/Best options to the many material and systems options available so informed decisions can be made to accomplish all budget objectives. Our **open-book/full disclosure arrangement** allows you to be our partner in this project. You will see construction cost itemizations in overview and detail fashion. We will complete detailed line item estimates, during the design phases.

- *SEE EXHIBIT #1 PROJECT MASTER BUDGET and EXHIBIT #2 DETAIL ESTIMATE SHEET*

BUDGET MANAGEMENT AND VALUE ANALYSIS

Every project we have managed has been delivered **at or under the established budget**. The referendum budget is set and the **project has to be managed to that budget**. There will be no opportunities to expend more than the budget. We will keep all TEAM members informed throughout the project.



"right from the start"

Total Project Cost Analysis and Tracking

We will **manage the project master budget from the early stages of design through the construction phase** including hard construction costs and the established project soft costs. We are also prepared to assist in quantifying allowances for owner provided requirements and established contingencies. We are ready to assist you in the making of informed decisions and spending dollars wisely.

Pre-Mobilization Conferencing

Getting it *"Right from the Start"* controls potential cost overruns and scheduling delays. By facilitating conferences with contractors, we will take a proactive approach in ensuring expectations regarding material specification requirements, procurement, scheduling, and shop drawing review, safety and payment procedures.

Project Cost Reporting Initiatives

During the construction timeline, regularly scheduled meetings are conducted with you, the architects and engineers to review the budget and payment applications. Each meeting is documented and notes are distributed to the attendees. **If the project is trending over the budget, we will recommend value engineering suggestions or other budget balancing recommendations to keep the project on budget.**

- *SEE EXHIBIT#3: MONTHLY DRAW*

Value Engineering and Systems Analysis

Our approach to Value Engineering is much more than looking at ways to reduce cost. By offering options and communicating the benefits, we have provided a higher degree of value to our clients. We understand that **value is based on importance** and are committed to listening, formulating thorough recommendations and facilitating your making of timely decisions. This process is centered on meeting the owner's goals and objectives throughout the project as outlined in the following four-step process.

Step 1: Proactively gather information

- Identify the specific items and what function they perform.
- Quantify the materials and labor costs.
- Confirm the items meet or exceed the project requirements and expectations.

Step 2: Devise alternatives

- Analyze and apply previous project experience and industry contacts.
- Identify good / better / best solutions for you and Project Architect consideration.

Step 3: Evaluation

- Confirm the implications to related scopes of work.
- Analyze the cost and schedule implications of the proposed alternative.
- Analyze life-cycle costs.
- Ensure the design intent and character of the project is not compromised.

Step 4: Report timely findings for informed decisions

- Provide detailed support documentation for review by you and the Project Architect.
- Present alternatives that must be of substance pertaining to cost and scheduling.

Change Order Procedures

The timely and consistent transfer of information is critical to the cost effective success of the project. Our staff will ensure accurate information is directed and tracked inclusive of all proposal requests and change orders. We will review all requested cost changes and confirm if they are realistic and legitimate.

Our approach to change order procedures is to be pro-active. Careful plan reviews during pre-construction reduces the number of change orders during construction.

As change orders are presented, we take the following steps to control cost and minimize the process time:

- Receive contractor change order or proposal request from the owner/architect
- Review the contract for responsibility
- Verify the need, including input from architect and engineer
- Substantiate the price
- Prepare change order documentation
- Submit for architect approval
- Submit for owner approval

We will monitor all change orders from inception through completion and provide regular updated overviews to keep you advised of all changes. With the establishment of the project master budget, a contingency line item is identified under the project's schedule of values and is used to document all formal changes to the project inclusive of both additions and cost savings.

DETAILED PROJECT PHASING AND SCHEDULING

Our construction experience will ensure an achievable project schedule is prepared and used as an effective tool in meeting the established completion dates. Performance expectations will clearly identify benchmarks for all scopes of work and make certain critical items of importance are prioritized. We will facilitate a team-scheduling workshop with you and the Architects. Working together, we will define project priorities and determine the key dates in a master schedule format

- Construction documents
- Bid period and due date
- Pre-award meetings and contracts
- Submittal review
- Start of construction
- Material procurement
- Substantial completion of construction phases
- Completion of construction
- Owner occupancy
- Close out requirements

Complete project schedules are prepared and included in the bid package for all sections. This is vital to communicate the expectations as the contractors bid. This also highlights the timing for long lead items to be ordered.

Schedules are continuously updated and distributed at contractor and owner meetings to keep everyone focused on delivering the project on time.

- *SEE EXHIBIT #4: PROJECT SCHEDULE*



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QUALITY CONTROL - ON-SITE FULL TIME PROJECT SUPERVISION AND COORDINATION

Meeting Coordination

We will facilitate regular job site meetings with subcontractors, the owner and the project architect. The open book documentation of these regular meetings will ensure project-scheduling expectations are met and will serve to address coordination and design questions prior to becoming potential issues or conflicts.

Site and Inspection Coordination

Our Site Construction Manager will monitor the productivity of all daily work performed by subcontractors. In addition, we will coordinate all necessary inspections and testing requirements. Daily observations will be logged to document job progress and performance.

Quality Assurance

Applying our experience and the thorough understanding of the project construction documents will ensure overall product quality. We will make certain materials are installed according to specification requirements and industry standards.

Design Documents – Relation to the Architect in Preparing Project Manual

Preparation of the project manual is a team effort between the architects and our staff. We will diligently review project documents to ensure proper language is incorporated into the bid documents regarding construction procedures and job safety. This is a great time to eliminate gray areas that lead to change orders.

Our Team takes the lead in the upfront manual sections of general requirements and contract conditions. We support the architect in verifying bid sections and will work to make certain the identified scope of work takes advantage of services provided by local contractors. These efforts are made to eliminate potential levels of sub-bidders and additional markups.

In addition, by working with the architects and engineers, we are able to identify a procurement schedule to ensure the timely delivery of critical materials. These actions are taken to ensure productivity and reduce the overall schedule duration, making it possible to fast track your project. Working as a TEAM with the architects and engineers will ensure a qualified control estimate is established prior to bidding. In addition, we will work together, to formulate project alternates thus allowing Waterville-Elysian-Morristown Area Schools the flexibility to make informed decisions.

PROJECT WORK SCOPES

Bid Phase Administration Including Multiple Prime Contracts

Providing a quality project within budget is the basis for all projects. Our team's approach is to provide the highest quality project for the value of the budget. Our bid phase approach is extensive and comprehensive in providing you with the highest value.

Prior to bid solicitation we **quantify the bid sections**, including general conditions, looking for efficiencies in **obtaining the most competitive bid by understanding your objectives**. We also look to separate the bid sections in a way that will best fit the strengths of local contractors (including area General Contractors) in the community. We aggressively market and advertise the project to local and regional contractors by

personally informing them about the project and to answer their questions. Contractor conferences are held to better their understanding of the project and ensure proposal requirements are clearly understood.

Our Team will coordinate the bid opening and tabulate the results. The team studies the results and conducts pre-award interviews with the successful contractors to verify their qualifications, project understanding and bid completeness. Upon owner approval, we write and award the contracts.

- SEE EXHIBIT #5: BID RESULTS RECAP

Recruiting and Engaging Local Contractors

Our Team's experience and reputation in engaging local contractors is substantial. This practice is the standard for our projects and engaging local contractors is another **"Right from the Start"** process for our firms, showing favorable results on bid day. The process we follow to engage local contractors include:

- **Survey of the local trade area** – We research the qualified contractor base in the trade area. A contractor call log is established and reviewed with the District.
- **Communication during detailed estimating** – Project Managers contact local contractors to establish local area pricing during the design stage estimates. Estimates are accurately established and contractor knowledge of the project is greater.
- **Separation of bid divisions** – Understanding the talent of the local contractor base directs us to establishing a breakdown of bid divisions that utilize their talents.
- **Treat contractors fairly** – Because we have **no conflict of interest** with the local construction trades, **they all have an equal opportunity** to work on this project or any of our team's projects. This includes area general contractors as well.
- **Impact on Community** – The school project will bring economic benefit for many local businesses also. Retail, services, restaurants, convenience stores, lodging and other businesses will all benefit from the activity the school project will bring.

SALES TAX SAVINGS

The bid sections classifications will be set up to take advantage of the District's sales tax exempt status while following the State's bid laws. Where appropriate to provide a lower cost approach, bid divisions will be split between **material and labor designations** with options for the District to assume a combination material and labor packages in lieu of the tax savings. We have found that in many instances, there is a greater cost advantage for material and labor combinations to be specified to take advantage of contractor discounts, warranty requirements and coordination.

Our process is flexible and can be catered to best meet the needs of the District. We will review the options of the District paying directly for materials or assignment of the contractor as a purchasing agent. We have worked with various schools, religious and municipal clients to best meet their tax-exempt status.

WORK IN EXISTING FACILITIES

Construction activity to an existing facility can create challenges. Our experience in construction to existing facilities is substantial in all types of facilities. We have found that the key to this type of construction is to clearly understand the function and objectives of the people and spaces during the construction timeline. **Communication is imperative.** We meet with administration, staff and other stakeholders to create a process plan to meet the needs of the situation. District and community schedules are coordinated with the



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construction schedule. Challenges are communicated and all parties are on the same page when construction starts. **Contractors are required to wear issued identification badges when working in areas where students are present.**

SAFETY PROGRAM

Our number one priority is to make certain the safety of all community members and project workers is not compromised. Aggressive management, education and on-site monitoring will be the standard throughout the duration of the project.

Our Team takes a pro-active approach to safety, which is evidenced in our excellent safety record. We discuss safety programs with contractors during contract administration. All contractors are required to provide their safety manuals for our review and documentation. Safety is an agenda item discussed at each of the contractor meetings and safety signing is prominently displayed at the jobsite and in construction trailers. Site Construction Managers conduct on-site inspections and look for possible safety problems like the use of hazardous chemicals or testing for the presence of carbon monoxide.

MANAGEMENT AND COORDINATION OF FINAL START-UP, TESTING AND OCCUPANCY

Securing Occupancy

As your construction manager and representative, our role is to manage the project to obtain occupancy on time. This is accomplished by dedicating our efforts to maintain the schedule, schedule all required inspections, process all questions and paper work, and coordinate with state and local agencies for their continued and final approvals.

Every project we have managed has received occupancy as scheduled.

Systems Start-Up, Testing and Training

Project Closeout is very important to our team, as the last impression often defines how successful we were in providing services for the project. We pay special attention to this responsibility by maintaining a quality control log to monitor quality control items throughout the duration of the project. Our pro-active approach ensures potential punch list items are completed in a timely manner and kept to a minimum.

As equipment is tested and operating properly, training sessions are coordinated for facility staff as orientation of the facility and systems. Upon final inspection, occupancy is coordinated with your staff. At this time, contractors are notified to begin warranty periods and to provide documents, manuals and provided guarantees. **To ensure all closeout responsibilities are complete and thoroughly addressed retainage will be held on all contracts pending the completion of required contractor responsibilities.**

PROJECT SYSTEMS COMMISSIONING

Once construction starts, we coordinate the commissioning agents schedule with the installation and startup of equipment. They become part of the TEAM and process to ensure all equipment is installed and operating according to the specifications. This includes final punch list verification.



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COMPENSATION

Thank you for your time to thoroughly review our proposal. The information provided clearly exhibits our qualifications to deliver your project.

As there is no scientific formula for calculating the value of services between firms, we will offer a clear and concise descriptive of what we propose as service fees and offer the flexibility to cater our services and fees to create value and meet your objectives.

UNDERSTANDING FEE VARIABLES

There are four potential categories to consider when comparing fee structures:

1. **BASE CONSTRUCTION MANAGEMENT FEES.** This includes direct and indirect costs of our employees and home office expenses. This includes all construction management personnel and site construction management personnel.
2. **REIMBURSABLE EXPENSES.** This includes costs for items secured and paid for by us that are project related and reimbursed by the District.
3. **GENERAL CONDITION ALLOWANCES.** These items are budgeted within the project cost and are competitively bid within the local market place as needed. These items are passed through at actual invoiced costs. There is **no markup** requested if paid directly by the District.
4. **FEE ENHANCEMENT OPPORTUNITIES.** These are opportunities inherent within the construction project where fees can be collected, but can be reclassified or hidden in communication to the owner.

BASE CONSTRUCTION MANAGEMENT FEES

Our **lump sum fixed fee arrangement** for Construction Management services during pre-construction, bidding, construction and post-construction phases are for **full services as outlined in our descriptive of Scope of Services and the AIA C132-2009 contract**. Our **fee includes all personnel** assigned to the project. Fees are calculated based on time needed to complete the scope of service. For purposes of this proposal and as outlined in the Review and Comment submittal to MDE, **we have calculated 17 months of construction timeline and have included a second Site Construction Manager for the work at the Morristown building for 7 months**. We are willing to review and adjust our fees into a revised lump sum agreement with the final approved schedule and review of services with the architect to eliminate any overlap in services. We will be fair and flexible in working with you to determine the proper fees for our services.

As this is an Agency Construction Management approach, the contract is for professional services. **The proposed fee arrangement can be negotiated as appropriate and adjusted as mutually agreed.**

FEE DESCRIPTION

DESIGN / DOCUMENTS PHASE	\$35,000 Fixed
PRE-BID / BID / AWARD PHASE	\$35,000 Fixed (1 Bid Phase)
POST CONSTRUCTION PHASE	\$22,000
CONSTRUCTION MANAGEMENT	\$327,000
CONSTRUCTION ON-SITE MANAGER	\$365,000
The Site Manager is full-time every day during the construction phase	
TOTAL PROPOSED FEE	\$784,000

Note: Deduct \$30,965 per month for a finalized schedule that is less than 17 months.



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SITE PROJECT REIMBURSABLE EXPENSES

\$4,000 per Month of Construction for each full-time Site Manager

- Mileage / Vehicles / Travel
- Site Office Technology & Equipment
- Project Supplies

PROJECT GENERAL CONDITION ITEMS – DIRECT PROJECT COSTS

All General Condition and Owner Expense items are project costs that are not considered in the calculation of construction management fees. These items will be competitively secured from the market at the current rates WITHOUT MARKUP if paid directly by the District. We will include these allowance items in the budget and directly pass the invoiced costs to the project, eliminating the potential for additional expenses and fees. **Any unused general condition and contingency allowances will be retained by the project.**

PROJECT GENERAL CONDITION EXPENSES

Construction Survey/Staking	Site Trailer and Sanitation	Temporary Electric
Temporary Heat	Site Technology Lines	Temporary Water
Equipment Rental	Construction Site Supplies	Site Safety
Temporary Enclosures	Barricades/Fences	Project Signage
Project Closeout	Dumpsters	Construction Cleanup
Final Cleanup	Snow Removal	Temporary Toilets
Storage Trailer	Hourly Workers	Temporary Roads/Maintenance
Temporary Stairs/Handrails	Traffic Control	

PROJECT OWNER EXPENSES – SOFT COSTS

Builder’s Risk Insurance	City Fees, WAC/SAC	Plan Review Fees
Building Permit	Plan Printing	Special Inspections
Commissioning	Consulting Fees	Site Survey
Soil Borings		

FEE ENHANCEMENT OPPORTUNITIES

R.A. Morton does not subscribe to a business model that practices Fee Enhancement Opportunities. All documentation is provided in an **open-book, full disclosure arrangement**. **We do not have our own company employed crews** to provide trade work or **subsidiary relationships with any companies that may account for a conflict of interest** regarding discretionary expenses, **eliminating all Fee Enhancement Opportunities**. **You will not pay for things twice!**

Examples of Fee Enhancement Opportunities are:

- Markup on contractor bids
- Provide work with company employed crews
- Include general condition items under the reimbursable category
- Markup on general condition allowances
- Create allowances for equipment rental that are also covered under contracts
- Rent large equipment from owned inventory or from subsidiary companies
- Accept kick back money or favors from companies
- Add markup to standard contingency change orders
- Request complete control of contingency allowances



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REFERENCES – PUBLIC EDUCATION

EXHIBITS

The following Exhibits were referenced in Scope of Services section:

- EXHIBIT #1: PROJECT MASTER BUDGET
- EXHIBIT #2: DETAIL ESTIMATE SHEET
- EXHIBIT#3: MONTHLY DRAW
- EXHIBIT #4: PROJECT SCHEDULE
- EXHIBIT #5: BID RESULTS RECAP

CASE STUDIES

- Sibley East Gaylord Elementary
- St. Cloud Quarryview Early Childhood
- Pierz
- Cedar Mountain
- Dover-Eyota
- Hawley
- Lakeview
- Renville County West

References – Public Education

PRE-REFERNDUM SERVICES – IN PROCESS

GFW Public Schools – Lonnie Seifert, Superintendent
323 E 11th Street, Gibbon, MN 55335
Bus: (507) 834-9813 E-mail: lonnie.seifert@gfwschools.org

Barnesville Public Schools – Scott Loeslie, Superintendent
302 3rd Street SE, Barnesville, MN 56514
Bus: (218) 354-2217 E-mail: sloeslie@barnesville.k12.mn.us

PRE-REFERENDUM AND CONSTRUCTION MANAGEMENT SERVICES

Eden Valley-Watkins Public Schools – Mark Messman, Superintendent
P.O. Box 100, Eden Valley, MN 55329
Bus: (320) 453-2900 E-mail: mmessman@evw.k12.mn.us

Mesabi East Public Schools and Osakis Public Schools - Gregg Allen, Superintendent
601 N 1st St. W, Aurora, MN 55705
Bus: (218) 229-3321 E-mail: gallen@mesabieast.k12.mn.us

Willow River Public Schools – Bill Peel, Superintendent
8142 Pine Street, Willow River, MN 55795
Bus: (218) 372-3131 E-mail: bpeel@isd577.org

Kenyon Wanamingo Public Schools – Jeff Pesta, Superintendent
225 Third Avenue, Wanamingo, MN 55983
Bus: (507) 789-7000 E-mail: jpesta@kw.k12.mn.us

Murray County Central Public Schools – Joe Meyer, Superintendent
2420 28th Street, Slayton, MN 56172
Bus: (507) 836-6184 E-mail: joe_meyer@mcc.mntm.org

Chatfield Public Schools - Ed Harris, Superintendent
205 Union Street NE, Chatfield, MN 55923
Bus: (507) 867-4210 E-mail: eharris@chatfield.k12.mn.us

Sibley East Public Schools - Jim Amsden, Superintendent
202 3rd Avenue NW, Arlington, MN 55307
Bus: (507) 964-8224 E-mail: jamsden@sibley-east.k12.mn.us

Renville County West Public Schools – Michelle Mortensen, Superintendent
Box 338/301 NE 3rd St. Renville, MN 56284
Bus: (320) 329-8362 E-mail: mmortensen@rcw.k12.mn.us



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Lakeview Public Schools – Chris Fenske, Superintendent
875 Barstad Rd N, Cottonwood, MN 56229
Bus: (507) 423-5164 E-mail: chrisfenske@lakeview2167.com

Dover-Eyota Public Schools – Bruce Klaehn, Superintendent
615 South Avenue SW, Eyota, MN 55934
Bus: (507) 545-2125 E-mail: bruceklaehn@desch.org

Underwood Public Schools – Jeremiah Olson, Superintendent
100 Southern Avenue, Underwood, MN 56586
Bus: (218) 826-6101 E-mail: jolson@underwood.k12.mn.us

ROCORI Public Schools - Scott Staska, Superintendent
534 5th Avenue North, Cold Spring, MN 56320
Bus: (320) 685-4901 E-mail: staskas@rocori.k12.mn.us

Fergus Falls Public Schools - Jerry Ness, Superintendent
605 Randolph Avenue, Fergus Falls, MN 56537
Bus: (218) 998-0544 E-mail: jness@fergusfalls.k12.mn.us

Pierz Public Schools - George Weber, Superintendent
112 Kamnic Street, Pierz, MN 56364
Bus: (320) 468-6458 E-mail: gweber@pierz.k12.mn.us

Verndale Public Schools - Paul Brownlow, Superintendent
411 SW Brown Street, Verndale, MN 56481
Bus: (218) 445-5055 E-mail: pbrownlow@verndale.k12.mn.us

Hawley Public Schools - Phil Jensen, Superintendent
714 Joseph Street, Hawley, MN 56549
Bus: (218) 483-4647 E-mail: pjensen@hawley.k12.mn.us

CONSTRUCTION MANAGEMENT SERVICES**Detroit Lakes Public Schools – Doug Froke, Superintendent**

702 Lake Ave, Detroit Lakes, MN 56501

Bus: (218) 847-9271 E-mail: dfroke@detlakes.k12.mn.us**Brooklyn Center Community Schools – Dr. Carly Baker, Superintendent**

6300 Shingle Creek Pkwy, Ste 286, Brooklyn Center, MN 55430

Bus: (763) 450-3386 E-mail: cbaker@brookcntr.k12.mn.us**Willmar Public Schools – Jeffery Holm, Superintendent**611 5th Street SW, Willmar, MN 56201Bus: (320) 231-8510 E-mail: holmj@willmar.k12.mn.us**Cedar Mountain Public Schools – Robert Tews, Superintendent**

PO Box 188, 310 Sommerville Ave., Morgan, MN 56266

Bus: (507) 249-5990 E-mail: rtews@cedarmt.org**Tri City United Public Schools - Matthew Helgerson, Superintendent (Currently in Jordan Schools)**Bus: (952) 492-6200 E-mail: mhelgerson@isd717.org**Lyle Public Schools - Jerry Reshetar, Superintendent (Currently in Grand Meadow Schools)**

710 4th Ave NE, Grand Meadow, MN 55936

Bus: (507) 754-5318 E-mail: jreshetar@gm.k12.mn.us**Chatfield Public Schools - Ed Harris, Superintendent (Don Hainlen, Retired Superintendent)**

205 Union Street NE, Chatfield, MN 55923

Bus: (507) 867-4210 E-mail: eharris@chatfield.k12.mn.us**Alexandria Schools - Trevor Peterson, Business Manager**

1410 S. McKay Avenue, Suite 101, Alexandria, MN 56308

Bus: (320) 762-2141 E-mail: tpeterso@alexandria.k12.mn.us**LeSueur Henderson Public Schools – Dave Johnson, Superintendent (Retired)**

115 1/2 North Fifth Street, Suite 200, Le Sueur, MN 56058-1849

Bus: (507) 665-4601



EXHIBIT #1

MASTER BUDGET WILLMAR PUBLIC SCHOOLS - LAKELAND ELEMENTARY SCHOOL

REFERENDUM BUDGET	5/12/16 Schematic Design		11/15/16 Design Development		Bid Results	Final Results
	\$	-	\$	-		
I. LAND	SUBTOTAL LAND	\$ -	\$ -	\$ -	\$ -	\$ -
II. CONSTRUCTION COSTS						
GENERAL CONDITIONS		\$ 446,890	\$ 446,890	\$ 616,890	\$ 641,381	
SITE IMPROVEMENTS		\$ 3,564,239	\$ 3,974,517	\$ 3,455,188	\$ 2,810,621	
SHELL COST	\$ 22,358,708	\$ 8,596,594	\$ 8,570,756	\$ 7,800,643	\$ 7,789,106	
INTERIOR FINISHES		\$ 2,670,242	\$ 2,503,782	\$ 2,780,150	\$ 2,883,160	
MECHANICAL/ELECTRICAL/PLUMBING		\$ 6,267,210	\$ 6,267,210	\$ 6,294,605	\$ 6,321,617	
SPECIALTIES		\$ 974,204	\$ 974,204	\$ 871,465	\$ 875,718	
CONTINGENCY	\$ 1,117,935	\$ 1,054,656	\$ 1,054,656	\$ 1,290,497		
SUBTOTAL CONSTRUCTION COSTS	\$ 23,476,643	\$ 23,574,035	\$ 23,792,015	\$ 23,109,438	\$ 21,321,603	
III. SOFT COSTS						
ARCHITECT / ENGINEER FEES	\$ 1,406,596	\$ 1,434,130	\$ 1,434,130	\$ 1,428,072	\$ 1,428,072	
CM FEES		\$ 587,025	\$ 587,025	\$ 587,025	\$ 587,025	
MISC. OWNER EXPENSES	\$ 670,761	\$ 464,730	\$ 439,730	\$ 557,584	\$ 319,148	
SUBTOTAL SOFT COSTS	\$ 2,077,357	\$ 2,485,885	\$ 2,460,885	\$ 2,572,681	\$ 2,334,245	
IV. OWNER ITEMS						
FURNITURE/FIXTURES/EQUIPMENT	\$ 2,263,441	\$ 1,220,184	\$ 1,220,184	\$ 1,220,184	\$ 1,386,731	
TECHNOLOGY		\$ 915,138	\$ 915,138	\$ 915,138	\$ 915,138	
OWNER PURCHASED ITEMS	\$ -	\$ -	\$ -	\$ -	\$ -	
SUBTOTAL OWNER ITEMS COSTS	\$ 2,263,441	\$ 2,135,322	\$ 2,135,322	\$ 2,135,322	\$ 2,301,869	
V. TOTAL PROJECT COST	\$ 27,817,441	\$ 28,195,242	\$ 28,388,222	\$ 27,817,441	\$ 25,957,717	

EXHIBIT #2

ESTIMATE SHEET: Design Development
 CUSTOMER: Willmar Public Schools
 LOCATION: Willmar MN
 ARCHITECT: ARY
 PROJECT: Lakeland Elementary School
 ESTIMATE # ESTIMATE #2

ESTIMATOR: Steve Plantenberg
 REVIEWED BY: Preston Euerle
 DATE: November 15, 2016
 GROSS SQUARE FEET: 97,763



<i>"right from the start"</i>		DESCRIPTION	Cost Per Square Foot	Estimate Totals	General Conditions	Site Imp.	Shell Cost	Interior Finish	Mechanical Electrical	Specialties
GC	01	Temporary Phone	\$ 0.06	\$ 5,700	\$ 5,700	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Technology	\$ 0.03	\$ 2,560	\$ 2,560	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Temp Office	\$ 0.12	\$ 11,680	\$ 11,680	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Temporary Storage	\$ 0.02	\$ 1,500	\$ 1,500	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Temporary Toilet	\$ 0.10	\$ 9,750	\$ 9,750	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Temporary Electricity	\$ 0.08	\$ 8,000	\$ 8,000	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Temporary Heat	\$ 1.02	\$ 99,750	\$ 99,750	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Barricades	\$ 0.49	\$ 47,600	\$ 47,600	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Safely	\$ 0.03	\$ 3,000	\$ 3,000	\$ -	\$ -	\$ -	\$ -	\$ -
GC	02	Survey	\$ 0.23	\$ 22,000	\$ 22,000	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Testing	\$ 1.11	\$ 109,000	\$ 109,000	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Hourly Workers	\$ 0.09	\$ 8,600	\$ 8,600	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Dumpsters	\$ 0.37	\$ 36,000	\$ 36,000	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Clean Up	\$ 0.39	\$ 38,100	\$ 38,100	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Equipment Rental / Misc.	\$ 0.08	\$ 7,500	\$ 7,500	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Construction Supplies	\$ 0.08	\$ 7,500	\$ 7,500	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Snow Removal / Road Maintenance	\$ 0.05	\$ 5,000	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Construction Signage	\$ 0.04	\$ 4,250	\$ 4,250	\$ -	\$ -	\$ -	\$ -	\$ -
GC	01	Overhead	\$ 0.20	\$ 19,400	\$ 19,400	\$ -	\$ -	\$ -	\$ -	\$ -
SC	03	Cast-In-Place Concrete	\$ 9.25	\$ 904,795	\$ -	\$ -	\$ 904,795	\$ -	\$ -	\$ -
SI	03	Site Concrete	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SC	03	Precast Concrete	\$ 11.11	\$ 1,086,000	\$ -	\$ -	\$ 1,086,000	\$ -	\$ -	\$ -
SC	04	Masonry	\$ 18.70	\$ 1,828,496	\$ -	\$ -	\$ 1,828,496	\$ -	\$ -	\$ -
SC	05	Steel (MO)	\$ 10.86	\$ 1,061,250	\$ -	\$ -	\$ 1,061,250	\$ -	\$ -	\$ -
SC	05	Steel (LO)	\$ 5.78	\$ 564,866	\$ -	\$ -	\$ 564,866	\$ -	\$ -	\$ -
SC	06	Carpentry	\$ 2.59	\$ 252,937	\$ -	\$ -	\$ 252,937	\$ -	\$ -	\$ -
SC	07	Roofing	\$ 13.77	\$ 1,346,220	\$ -	\$ -	\$ 1,346,220	\$ -	\$ -	\$ -
SC	07	Caulking	\$ 0.44	\$ 42,780	\$ -	\$ -	\$ 42,780	\$ -	\$ -	\$ -
SC	08	Doors, Frames, Hdw.	\$ 2.03	\$ 198,400	\$ -	\$ -	\$ 198,400	\$ -	\$ -	\$ -
SC	08	Aluminum Doors, Frames, & Curtain Wall	\$ 13.14	\$ 1,285,012	\$ -	\$ -	\$ 1,285,012	\$ -	\$ -	\$ -
IF	09	Gypsum System	\$ 12.91	\$ 1,262,129	\$ -	\$ -	\$ -	\$ 1,262,129	\$ -	\$ -
IF	09	Tilework	\$ 1.07	\$ 105,022	\$ -	\$ -	\$ -	\$ 105,022	\$ -	\$ -
IF	09	Acoustical Ceiling	\$ 1.85	\$ 181,234	\$ -	\$ -	\$ -	\$ 181,234	\$ -	\$ -
IF	09	Floor Covering	\$ 2.70	\$ 263,767	\$ -	\$ -	\$ -	\$ 263,767	\$ -	\$ -
IF	10	Terrazzo	\$ 3.07	\$ 300,140	\$ -	\$ -	\$ -	\$ 300,140	\$ -	\$ -
IF	09	Athletic Flooring	\$ 1.13	\$ 110,250	\$ -	\$ -	\$ -	\$ 110,250	\$ -	\$ -
IF	09	Painting	\$ 1.60	\$ 156,450	\$ -	\$ -	\$ -	\$ 156,450	\$ -	\$ -
SP	10	Visual Display Boards	\$ 0.35	\$ 34,650	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 34,650
IF	10	Toilet Partitions	\$ 0.50	\$ 48,750	\$ -	\$ -	\$ -	\$ 48,750	\$ -	\$ -
SP	10	Folding Partitions	\$ 0.09	\$ 8,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,500
IF	10	ID Devices	\$ 0.10	\$ 9,450	\$ -	\$ -	\$ -	\$ 9,450	\$ -	\$ -
SP	10	Lockers	\$ 0.99	\$ 97,110	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 97,110
SP	10	Fire Devices	\$ 0.04	\$ 3,900	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,900
ME	10	Elevator	\$ 0.82	\$ 80,000	\$ -	\$ -	\$ -	\$ -	\$ 80,000	\$ -
IF	11	Athletic Equipmnet	\$ 0.49	\$ 48,190	\$ -	\$ -	\$ -	\$ 48,190	\$ -	\$ -
IF	11	Bleachers	\$ 0.19	\$ 18,400	\$ -	\$ -	\$ -	\$ 18,400	\$ -	\$ -
SP	11	Scoreboards	\$ 0.08	\$ 8,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,000
SP	11	Kitchen Equipment	\$ 6.39	\$ 624,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 624,500
SP	12	Furnishings	\$ 2.02	\$ 197,544	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 197,544
ME	21	Fire Suppression	\$ 1.65	\$ 161,710	\$ -	\$ -	\$ -	\$ -	\$ 161,710	\$ -
ME	22	Plumbing	\$ 16.33	\$ 1,596,500	\$ -	\$ -	\$ -	\$ -	\$ 1,596,500	\$ -
ME	23	H.V.A.C.	\$ 26.87	\$ 2,626,500	\$ -	\$ -	\$ -	\$ -	\$ 2,626,500	\$ -
ME	26	Electrical	\$ 18.44	\$ 1,802,500	\$ -	\$ -	\$ -	\$ -	\$ 1,802,500	\$ -
SI	31	Earthwork	\$ 21.43	\$ 2,094,659	\$ -	\$ 2,094,659	\$ -	\$ -	\$ -	\$ -
SI	32	Landscaping & Irrigation	\$ 9.19	\$ 898,027	\$ -	\$ 898,027	\$ -	\$ -	\$ -	\$ -
SI	32	Asphalt Paving	\$ 10.04	\$ 981,831	\$ -	\$ 981,831	\$ -	\$ -	\$ -	\$ -
IF		Design Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SC		Construction Contingency	\$ 10.79	\$ 1,054,656	\$ -	\$ -	\$ 1,054,656	\$ -	\$ -	\$ -
ESTIMATED TOTAL COST			\$ 243.36	\$ 23,792,015	\$ 446,890	\$ 3,974,517	\$ 9,625,412	\$ 2,503,782	\$ 6,267,210	\$ 974,204
Cost per square foot				\$ 243.36	\$ 4.57	\$ 40.65	\$ 98.46	\$ 25.61	\$ 64.11	\$ 9.96

Construction Management Fees	\$ 6.00	\$ 587,025
Arch./Eng. Fees	\$ 14.67	\$ 1,434,130
Misc. Owner Expenses	\$ 4.50	\$ 439,730
FF & E	\$ 12.48	\$ 1,220,184
Technology	\$ 9.36	\$ 915,138
SOFT COSTS	\$ 47.01	\$ 4,596,207
TOTAL PROJECT	\$ 290.38	\$ 28,388,222
Budget		\$ 27,819,441
Over / (Under) Budget		\$ 568,781



EXHIBIT #3

AIA Document G736™ - 2009

Project Application and Project Certificate for Payment, Construction Manager as Adviser Edition

TO OWNER: I.S.D. #347 - Willmar Public Schools
PROJECT: New Elementary School
APPLICATION NO: 22
PERIOD TO: June 20, 2018
Distribution to: OWNER: CONSTRUCTION MANAGER: ARCHITECT:

ATTENTION: Dr. Jeffrey Holm, Superintendent
VIA CONSTRUCTION MANAGER: R. A. Morton & Associates, Inc.
PROJECT NOS: 1511 /

PROJECT APPLICATION FOR PAYMENT

Application is made for Payment, as shown below, in connection with the Project. AIA Document G737™-2009, Summary of Contractors' Applications for Payment, is attached.

- 1. TOTAL CONTRACT SUMS (Item A Totals) \$27,819,441.00
- 2. TOTAL NET CHANGES BY CHANGE ORDERS (Item B Totals) \$0.00
- 3. TOTAL CONTRACT SUM TO DATE (Item C Totals) \$27,819,441.00
- 4. TOTAL COMPLETED & STORED TO DATE (Item F Totals) \$24,530,593.27
- 5. RETAINAGE (Item H Totals) \$304,955.00
- 6. LESS PREVIOUS TOTAL PAYMENTS (Item I Totals) \$24,168,225.10

7. CURRENT PAYMENT DUE (Item J Totals) \$57,413.17

The undersigned Construction Manager certifies that to the best of its knowledge, information and belief this Project Application for Payment is an accurate compilation of the Contractors' Applications for Payment, attached hereto.

CONSTRUCTION MANAGER: _____
 By: _____ Date: 7-10-18
 State of: Minnesota
 County of: Stearns
 Subscribed and sworn to before me this 10th day of July 2018
 Notary Public: Linda M. Day
 My Commission expires: January 31, 2020



PROJECT CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on evaluation of the Work and the data comprising this Application, the Construction Manager certifies to the Owner that to the best of its knowledge, information and belief the Work has progressed as indicated; the quality of the Work is in accordance with the Contract Documents; and the Construction Manager recommends to the Owner and Architect that the Contractors be paid the AMOUNTS set forth in the attached Summary of Contractors' Applications for Payment.

TOTAL OF AMOUNTS CERTIFIED \$57,413.17

CONSTRUCTION MANAGER: _____
 By: Robert Swick Date: 7/16/18

In accordance with the Contract Documents, based on evaluation of the Work, the data comprising this Application, and the Construction Manager's recommendation, the Architect certifies to the Owner that to the best of its knowledge, information and belief the Work has progressed as indicated; the quality of the Work is in accordance with the Contract Documents; and the Contractors are entitled to payments of the AMOUNTS set forth in the attached Summary of Contractors' Applications for Payment.

ARCHITECT: _____
 By: _____ Date: 7/16/18

Robert Swick 7/16/18

I.S.D. #347 - Willmar Elementary School
 Project Application Summary
 Application No. 22
 Period From: 05/20/18
 To: 06/20/18

Construction Manager:
 R. A. Morton & Associates, Inc.
 3315 Roosevelt Road, Suite 100
 St. Cloud, MN 56301

Architect:
 Architects Rego + Youngquist, Inc.
 7601 Wayzata Boulevard, Suite 200
 St. Louis Park, MN 55426

	Contract Sum	Change Orders	Contract To Date	Work In Place	Materials Stored	Total Completed	Retainage Amount	Previous Payments	Current Payment	Balance to Finish	Percent Complete
Temp Phone	5,700.00 * Added To Contingency * (4,524.94)		1,175.06	1,034.99		1,034.99		1,034.99		140.07	88%
Technology	2,560.00 * Added To Contingency * (2,560.00)		0.00							0.00	100%
Temp Office	11,680.00 * Added To Contingency * (4,673.79)		7,006.21	7,006.21		7,006.21		7,006.21		0.00	100%
Temp Storage	6,000.00 * Added To Contingency * (4,800.00)		1,200.00	1,200.00		1,200.00		1,200.00		0.00	100%
Temp Toilet	9,750.00 * Added To Contingency * (3,667.62)		6,082.38	6,082.38		6,082.38		6,082.38		0.00	100%
Temp Electric	8,000.00 * Taken From Contingency * 18,788.60		26,788.60	26,788.60		26,788.60		26,788.60		0.00	100%
Temp Heat	126,000.00 * Taken From Ref. Var./Trans. To Equip. Rental * (10,299.92)		115,700.08	115,700.08		115,700.08		115,700.08		0.00	100%
Barricades	86,100.00 * Trans. To Misc. Mat'l; Hourly Workers; Cont. * (46,356.80)		39,743.20	39,743.20		39,743.20		39,743.20		0.00	100%
Safety	3,000.00 * Added To Contingency * (2,783.61)		216.39	216.39		216.39		216.39		0.00	100%
Survey - Construction	20,250.00 * Added To Contingency * (6,899.00)		13,351.00	13,351.00		13,351.00		13,351.00		0.00	100%
Construction Testing	109,000.00 * Added To Contingency * (34,341.69)		74,658.31	74,658.31		74,658.31		74,658.31		0.00	100%
Hourly Workers	21,100.00 * Taken From Rel. Var./Contingency/Barricades * 97,596.60		118,696.60	118,696.60		118,696.60		118,696.60		0.00	100%
Dumpsters	51,000.00 * Added To Contingency * (3,732.01)		47,267.99	46,049.99		46,049.99		46,049.99		1,218.00	97%
Clean Up	56,100.00 * Added To Contingency * (10,793.34)		47,306.66	45,806.66		45,806.66		45,806.66		1,500.00	97%
Equipment Rental	10,000.00 * Trans. From Temp Heat/To Contingency * 19,021.87		29,021.87	29,021.87		29,021.87		29,021.87		0.00	100%
Miscellaneous Materials	\$ To Msrny. Wall Flashing Allow. /From Barricades 10,000.00		10,868.91	10,868.91		10,868.91		10,868.91		0.00	100%
Snow Removal/Road Maintenance	55,000.00 * Taken From Referendum Variance/Added to Cont * 37,434.10		92,434.10	92,434.10		92,434.10		92,434.10		0.00	100%
Construction Signage	4,250.00 * Added To Contingency * (11.26)		4,238.74	4,238.74		4,238.74		4,238.74		0.00	100%
Job Overhead	19,400.00 * Added To Contingency * (15,779.31)		3,620.69	3,556.54		3,556.54		3,487.37	69.17	64.15	98%
Sub-Totals:	\$616,890.00	\$22,486.79	\$639,376.79	\$636,454.57	\$0.00	\$636,454.57	\$0.00	\$636,385.40	\$69.17	\$2,922.22	100%

Willmar Elementary School	Contract Sum	Change Order	Contract To Date	Work In Place	Materials Stored	Total Completed	Retainage Amount	Previous Payments	Current Payment	Balance to Finish	Percent Complete
3A Concrete Triple V Concrete Constr., Inc.	710,000.00	(44,709.78)	665,290.22	665,290.22		665,290.22		665,290.22		0.00	100%
Corrective Concrete QC Companies	0.00	17,785.00	17,785.00	17,785.00		17,785.00		17,785.00		0.00	100%
* Line Item Added - \$ Taken From Contingency **											
3D Combined Precast Walls Concrete Products Co.	966,850.00	2,737.50	969,587.50	969,587.50		969,587.50		969,587.50		0.00	100%
4A Masonry Double J Concrete & Masonry	733,440.00	24,796.29	758,236.29	758,236.29		758,236.29		758,236.29		0.00	100%
4B Masonry Veneer HTH Building & Masonry, Inc.	662,644.00	9,185.00	671,829.00	671,829.00		671,829.00		671,829.00		0.00	100%
Masonry Wall Flashing Allowance	4,900.00	7,876.93	12,776.93	12,776.93		12,776.93		12,776.93		0.00	100%
* Trans. From Miscellaneous Materials *											
5A Steel Supply (MO) CAB Construction Co.	639,152.00	(22,987.13)	616,164.87	616,164.87		616,164.87		616,164.87		0.00	100%
5B Steel Erection (LO) Breitbach Construction Co.	280,000.00	6,887.00	286,887.00	286,887.00		286,887.00		286,887.00		0.00	100%
5C Steel Supply (MO) Brown Hawk, LLC dba Northern Lights Steel Fabrication	192,700.00	(7,520.00)	185,180.00	185,180.00		185,180.00		185,180.00		0.00	100%
5D Steel Erection (LO) Breitbach Construction Co.	128,900.00	1,074.00	129,974.00	129,974.00		129,974.00		129,974.00		0.00	100%
6A Carpentry ComerStone of Willmar, Inc.	313,900.00	(4,772.49)	309,127.51	309,127.51		309,127.51		309,127.51		0.00	100%
7A Membrane Waterproofing Henkemeyer Coatings, Inc.	16,500.00	2,864.00	19,364.00	19,364.00		19,364.00		19,364.00		0.00	100%
7B Roofing Roof 1 RBR, Inc.	646,266.56	(17,456.00)	628,810.56	628,810.56		628,810.56		628,810.56		0.00	100%
7C Caulking The Caulkers Company, Inc.	48,000.00	1,100.00	49,100.00	49,100.00		49,100.00		49,100.00		0.00	100%

Wilmar Elementary School	Contract Sum	Change Order	Contract To Date	Work In Place	Materials Stored	Total Completed	Retainage Amount	Previous Payments	Current Payment	Balance to Finish	Percent Complete
7D Metal Wall Panels Minnesota Architectural Products Co.	934,934.00	(11,250.00)	923,684.00	923,684.00		923,684.00	45,377.00	878,307.00		0.00	100%
8A Doors, Frames, and Hardware (MO) Mid Central Door Co.	195,123.00	3,152.00	198,275.00	198,275.00		198,275.00		198,275.00		0.00	100%
8B Overhead Doors API Garage Door Store	17,995.00		17,995.00	17,995.00		17,995.00		17,995.00		0.00	100%
8C Aluminum Curtain Wall, Entrances and Glazing W. L. Hall Company	981,145.00	5,981.01	987,126.01	987,126.01		987,126.01		987,126.01		0.00	100%
8D Translucent Skylight and Window Panels W. L. Hall Company	25,993.00		25,993.00	25,993.00		25,993.00		25,993.00		0.00	100%
9A Exterior Light Gauge Framing Regal Contractors, Inc.	302,200.00	13,720.00	315,920.00	315,920.00		315,920.00		315,920.00		0.00	100%
9B Gypsum Systems Regal Contractors, Inc.	1,005,000.00	35,927.00	1,040,927.00	1,040,927.00		1,040,927.00		1,040,927.00		0.00	100%
9C Tilework Floor to Ceiling	149,000.00	8,635.83	157,635.83	157,635.83		157,635.83		157,635.83		0.00	100%
9D Floor Coverings Floor to Ceiling	298,000.00	1,118.00	299,118.00	299,118.00		299,118.00		299,118.00		0.00	100%
9E Terrazzo Flooring Advance Terrazzo and Tile Co.	261,000.00	32,172.01	293,172.01	293,172.01		293,172.01		293,172.01		0.00	100%
Terrazzo Logo Allowance	7,500.00	Added To Contingency * (7,500.00)	0.00							0.00	100%
9F Acoustical Ceilings St. Cloud Acoustics	369,675.00	3,436.00	373,111.00	373,111.00		373,111.00		373,111.00		0.00	100%
9G Painting Full Spectrum Finishing, Inc.	164,350.00	3,465.00	167,815.00	167,815.00		167,815.00		167,815.00		0.00	100%

Willmar Elementary School	Contract Sum	Change Order	Contract To Date	Work In Place	Materials Stored	Total Completed	Retainage Amount	Previous Payments	Current Payment	Balance to Finish	Percent Complete
9H Wood Flooring FLR Sanders, Inc.	115,300.00		115,300.00	115,300.00		115,300.00	5,765.00	109,535.00		0.00	100%
9I Synthetic Sport Flooring FLR Sanders, Inc.	21,700.00	(650.00)	21,050.00	21,050.00		21,050.00	1,053.00	19,997.00		0.00	100%
10A Loading Dock Lift RMH Systems	9,567.00	718.56	10,305.56	10,305.56		10,305.56		10,305.56		0.00	100%
10C Lockers JF Equipment, LLC	82,700.00		82,700.00	82,700.00		82,700.00		82,700.00		0.00	100%
10D Paired Partitions Hufcor, Inc.	280,393.00		280,393.00	280,393.00		280,393.00		280,393.00		0.00	100%
10E Signage Laughlin Enterprises, Inc. dba Quick Signs of Willmar	14,153.00	(937.00)	13,216.00	13,216.00		13,216.00		13,216.00		0.00	100%
Owner Monument Sign Allowance											
11A Athletic Equipment H & B Specialized Products	81,850.00		81,850.00	81,850.00		81,850.00		81,850.00		0.00	100%
11B Bleachers Sealing & Athletic Facility Enterprises, LLC	10,813.00		10,813.00	10,813.00		10,813.00		10,813.00		0.00	100%
11C Scoreboards Daktronics	8,000.00	1,911.00	19,911.00	19,911.00		19,911.00		19,911.00		0.00	100%
Scoreboard Installation Allowance											
11D Food Service Strategic Equipment, LLC	474,785.00	2,037.34	476,822.34	475,980.00		475,980.00	23,799.00	452,181.00		842.34	100%
12A Casework TMI Systems Corporation	281,809.00	3,190.00	284,999.00	284,999.00		284,999.00		284,999.00		0.00	100%
12B Window Treatments Multiple Concepts Interiors	16,000.00	(13,664.40)	2,335.60	2,335.60		2,335.60		2,335.60		0.00	100%

* Contract Prepared Later *

* Line Item Added - \$ Taken from Contingency *

* Contract Prepared Later *

Willmar Elementary School	Contract Sum	Change Order	Contract To Date	Work In Place	Materials Stored	Total Completed	Retainage Amount	Previous Payments	Current Payment	Balance to Finish	Percent Complete
14A Elevator ThyssenKrupp Elevator Corp.	108,000.00	4,640.00	112,640.00	112,640.00		112,640.00		112,640.00		0.00	100%
21A Fire Suppression Breth - Zenzen Fire Protection	145,300.00		145,300.00	145,300.00		145,300.00		145,300.00		0.00	100%
22A Plumbing Lake Country Mechanical, Inc.	874,100.00	6,813.00	880,913.00	880,913.00		880,913.00	44,046.00	836,867.00		0.00	100%
23A HVAC Chappell Central, Inc.	2,728,000.00	4,752.00	2,732,752.00	2,732,752.00		2,732,752.00	136,638.00	2,596,114.00		0.00	100%
25A Integrated Automation Trane Company	394,205.00	(45,446.00)	348,759.00	348,759.00		348,759.00		348,759.00		0.00	100%
26A Electrical Communications Safety and Security Avon Electric Services, Inc.	2,045,000.00	56,253.00	2,101,253.00	2,101,253.00		2,101,253.00		2,101,253.00		0.00	100%
31A Earthwork & Site Demolition Quam Construction Co., Inc.	959,920.00	427,243.09	1,387,163.09	1,387,163.09		1,387,163.09		1,387,163.09		0.00	100%
31B Excavation and Backfill Duininck, Inc.	198,240.00		198,240.00	198,240.00		198,240.00		198,240.00		0.00	100%
32A Site Concrete K. Johnson Construction, Inc.	277,875.00	77,790.23	355,665.23	355,665.23		355,665.23	17,783.00	337,882.23		0.00	100%
32B Asphalt Paving and Exterior Signage Duininck, Inc.	743,956.00	(313,535.75)	430,420.25	428,163.23		428,163.23	21,408.00	406,755.23		2,257.02	99%
32C Landscaping and Irrigation Klein Landscaping & Nursery	592,338.00	(316,149.00)	276,189.00	181,727.00		181,727.00	9,086.00	128,332.00	44,309.00	94,462.00	66%
Landscaping Allowance				7,185.00		7,185.00			7,185.00	67,815.00	10%
32D Fencing and Site Furnishings Century Fence Company	682,859.00	(615,011.00)	67,848.00	67,848.00		67,848.00		67,848.00		0.00	100%
Sub-Total	\$21,202,050.56	(\$541,924.76)	\$20,660,125.80	\$20,494,749.44	\$0.00	\$20,494,749.44	\$304,955.00	\$20,198,300.44	\$51,494.00	\$165,376.36	99%

* Contract Prepared Later *

* Contract Prepared Later *

* Contract Prepared Later *

* Line Item Added - \$ Taken From Contingency *

* Contract Prepared Later *

Willmar Elementary School	Contract Sum	Change Order	Contract To Date	Work In Place	Materials Stored	Total Completed	Retainage Amount	Previous Payments	Current Payment	Balance to Finish	Percent Complete
CM Fees											
R. A. Morton & Associates	587,025.00		587,025.00	587,025.00		587,025.00		587,025.00		0.00	100%
Architect Fees	1,428,072.00		1,428,072.00	730,582.25		730,582.25		730,582.25		697,489.75	51%
SAC, WAC, & Utilities Allowance	227,640.00		227,640.00	59,333.80		59,333.80		59,333.80		168,306.20	26%
			* Includes Testing for Potential Site *								
Soil Borings & Report	33,924.15		33,924.15	33,924.15		33,924.15		33,924.15		0.00	100%
Site Survey	13,715.00		13,715.00	13,715.00		13,715.00		13,715.00		0.00	100%
Realtor Location Analysis	8,750.00		8,750.00	8,750.00		8,750.00		8,750.00		0.00	100%
Legal	3,645.00		3,645.00	3,645.00		3,645.00		3,645.00		0.00	100%
Plan Review Allowance	69,602.00		69,602.00	3,169.00		3,169.00		3,169.00		66,433.00	5%
Building Permit Allowance	109,497.00		109,497.00	99,585.21		99,585.21		99,585.21		9,911.79	91%
			* Taken From Contingency *								
Builders Risk	20,301.00	6,608.00	26,909.00	26,909.00		26,909.00		26,909.00		0.00	100%
Commissioning	56,510.00		56,510.00	28,232.42		28,232.42		22,382.42	5,850.00	28,277.58	50%
Plan Printing	16,000.00		16,000.00	13,608.75		13,608.75		13,608.75		2,391.25	85%
			* Taken From Contingency *								
Furniture & Equipment	1,220,184.00	166,546.76	1,386,730.76	1,386,730.76		1,386,730.76		1,386,730.76		0.00	100%
Technology & Hardware	915,138.00		915,138.00	404,178.92		404,178.92		404,178.92		510,959.08	44%
Construction Contingency	1,290,497.29	(857,718.79)	432,778.50							432,778.50	66%
Referendum Variance	0.00	1,204,002.00	1,204,002.00							1,204,002.00	0%
Sub-Total	\$6,000,500.44	\$519,437.97	\$6,519,938.41	\$3,399,389.26	\$0.00	\$3,399,389.26	\$0.00	\$3,393,539.26	\$5,850.00	\$3,120,549.15	52%
Construction Total	\$27,819,441.00	\$0.00	\$27,819,441.00	\$24,530,593.27	\$0.00	\$24,530,593.27	\$304,955.00	\$24,168,225.10	\$57,413.17	\$3,288,847.73	88%

* Land Cost of \$870,937.54 is Not Reflected in Construction Totals.



CALIFORNIA #44

New Willmar Elementary School Structure & Enclosure

Task Name	Duration	Start	Finish	3rd Quarter			1st Quarter			3rd Quarter		
				May	Jul	Sep	Nov	Jan	Mar	May	Jul	Sep
Bid Packages	211 days	Thu 5/5/16	Thu 2/23/17									
Bid Package 2	21 days	Thu 6/30/16	Thu 7/28/16									
Bid Package 3	19 days	Mon 8/1/16	Thu 8/25/16									
Classroom Wing	246 days	Mon 8/22/16	Tue 8/1/17									
Excavate Footings	22 days	Mon 8/22/16	Tue 9/20/16									
Footings	22 days	Tue 8/23/16	Wed 9/21/16									
Conc. Found. Walls and Ext. Wall Piers	30 days	Tue 9/6/16	Mon 10/17/16									
Masonry Elevator Shaft (1st Floor)	5 days	Mon 9/12/16	Fri 9/16/16									
Backfill, Compaction and Drain Tile	15 days	Tue 10/4/16	Mon 10/24/16									
Excavate Pier Footings	5 days	Thu 10/20/16	Wed 10/26/16									
Pier Footings	5 days	Fri 10/21/16	Thu 10/27/16									
Pour Piers	5 days	Mon 10/24/16	Fri 10/28/16									
Backfill and Compaction Piers	5 days	Mon 10/31/16	Fri 11/4/16									
Structural Steel Erection (1st Floor)	11 days	Mon 10/31/16	Mon 11/14/16									
Hollow Core Plank	15 days	Fri 11/18/16	Thu 12/8/16									
Exterior Framing and Sheathing (1st Floor)	20 days	Fri 11/25/16	Thu 12/22/16									
Structural Steel Erection (2nd Floor)	9 days	Fri 12/9/16	Wed 12/21/16									
Masonry Elevator Shaft (2nd Floor)	5 days	Fri 12/9/16	Thu 12/15/16									
Steel Joist	10 days	Thu 12/22/16	Wed 1/4/17									
Metal Deck	10 days	Thu 12/29/16	Wed 1/11/17									
Exterior Framing and Sheathing (2nd Floor)	20 days	Thu 1/5/17	Wed 2/1/17									
Exterior Wall Insulation	15 days	Thu 1/12/17	Wed 2/1/17									
Roof Rough Carpentry	10 days	Thu 1/12/17	Wed 1/25/17									
Exterior Face Brick	60 days	Thu 1/19/17	Wed 4/12/17									
M&E Underground	17 days	Mon 1/23/17	Tue 2/14/17									
EPDM Roofing	15 days	Thu 1/26/17	Wed 2/15/17									
Concrete Topping	7 days	Thu 2/2/17	Fri 2/10/17									
Interior LG Framing (2nd Floor)	15 days	Mon 2/13/17	Fri 3/3/17									
M&E Rough In (2nd Floor)	20 days	Mon 2/13/17	Fri 3/10/17									
Slab On Grade	18 days	Wed 2/15/17	Fri 3/10/17									



New Willmar Elementary School Structure & Enclosure

Task Name	Duration	Start	Finish	3rd Quarter			1st Quarter			3rd Quarter						
				May	Jul	Sep	Nov	Jan	Mar	May	Jul	Sep				
Interior LG Framing (1st Floor)	12 days	Mon 3/6/17	Tue 3/21/17													
Curtainwall and Entrance Systems	30 days	Mon 3/13/17	Fri 4/21/17													
M & E Rough In (1st Floor)	20 days	Mon 3/13/17	Fri 4/7/17													
Aluminum Frames	15 days	Thu 3/23/17	Wed 4/12/17													
Parapet Cap	10 days	Thu 4/27/17	Wed 5/10/17													
Activity Wing	274 days	Thu 9/22/16	Tue 10/10/17													
Excavate Footings	20 days	Thu 9/22/16	Wed 10/19/16													
Footings	20 days	Fri 9/23/16	Thu 10/20/16													
Concrete Foundation Walls	30 days	Tue 10/18/16	Mon 11/28/16													
Backfill, Compaction and Drain Tile	15 days	Tue 11/15/16	Mon 12/5/16													
Deliver HM Frames	0 days	Tue 11/29/16	Tue 11/29/16													
Above Grade Bearing Masonry	30 days	Tue 12/6/16	Mon 1/16/17													
Precast Wall Panels	7 days	Fri 12/16/16	Mon 12/26/16													
Steel Joist	15 days	Tue 1/17/17	Mon 2/6/17													
Cavity Wall Insulation	5 days	Tue 1/17/17	Mon 1/23/17													
Exterior Face Brick	40 days	Tue 1/17/17	Mon 3/13/17													
Metal Deck	10 days	Fri 1/27/17	Thu 2/9/17													
Roof Rough Carpentry	5 days	Fri 2/10/17	Thu 2/16/17													
EPDM Roofing	20 days	Fri 2/17/17	Thu 3/16/17													
M&E Underground	18 days	Fri 3/3/17	Tue 3/28/17													
Metal Wall Panels	10 days	Tue 3/7/17	Mon 3/20/17													
Aluminum Frames	15 days	Tue 3/7/17	Mon 3/27/17													
Parapet Cap	10 days	Fri 3/17/17	Thu 3/30/17													
Slab On Grade	15 days	Wed 3/29/17	Tue 4/18/17													
Window Treatments (Exterior)	10 days	Thu 3/30/17	Wed 4/12/17													
Curtainwall and Entrance Systems	25 days	Wed 4/19/17	Tue 5/23/17													
Interior Masonry Walls	10 days	Wed 4/19/17	Tue 5/2/17													
M&E Rough In	35 days	Wed 5/10/17	Tue 6/27/17													



Results Recap - Willmar Elementary School - Bid Packages 1-4

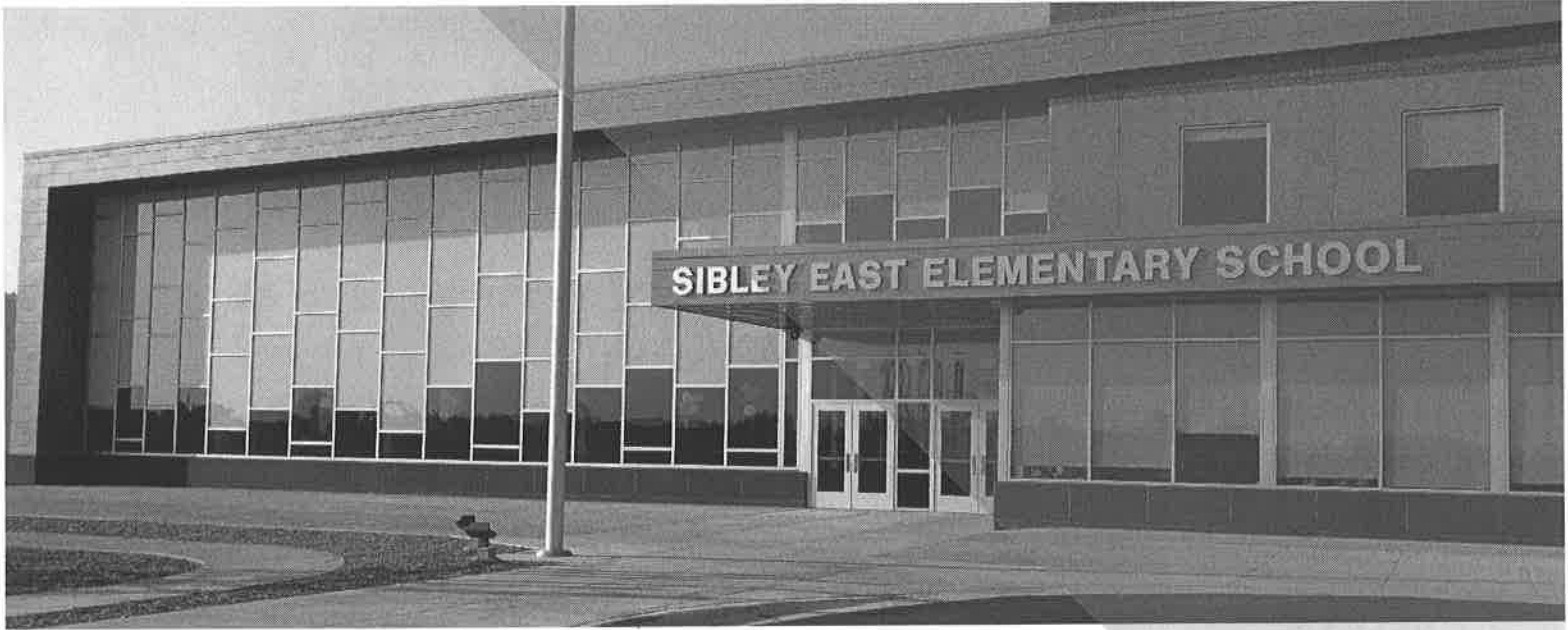
EXHIBIT #5

Section	Bid #1	Bid #2	Bid #3	Bid #4	Bids	Bids	Bids	Bid #5	Average Bid	Low Bid	2nd Low Bid	Contract Amounts Without Alternates
BID PACKAGE 1												
31A Sitework	\$959,920	\$1,015,513	\$1,111,111	\$1,178,610					\$1,066,289	\$959,920	\$1,015,513	\$959,920
BID PACKAGE 2												
3A Concrete	\$710,000	\$984,000	\$1,138,000	\$1,214,000	\$1,254,000	\$1,294,899	\$1,453,508		\$1,149,772	\$710,000	\$984,000	\$710,000
3B Precast Concrete Plank	\$328,128								\$328,128	\$328,128	\$328,128	\$328,128
3C Precast Wall Panels	\$644,544								\$644,544	\$644,544	\$644,544	\$644,544
3D Combined Precast									\$0	\$0	\$0	\$966,850
4A Masonry	\$733,440	\$758,000	\$847,613						\$779,684	\$733,440	\$758,000	\$733,440
5A Steel Supply	\$639,152	\$641,400	\$649,500	\$691,231	\$715,000	\$744,286	\$793,500		\$697,010	\$639,152	\$641,400	\$639,152
5B Steel Erection	\$280,000	\$292,700	\$347,000	\$431,300	\$586,000	\$734,000			\$445,167	\$292,700	\$292,700	\$280,000
7A Membrane Waterproofing	\$16,500								\$16,500	\$16,500	\$16,500	\$16,500
7B Roofing	\$646,267	\$784,700	\$792,860	\$1,100,429	\$1,140,355	\$685,000			\$892,946	\$646,267	\$784,700	\$646,267
9A Exterior Light Gauge Framing	\$212,000	\$302,200	\$455,800	\$491,376	\$579,000				\$454,229	\$212,000	\$302,200	\$302,200
10A Loading Dock Lift	\$7,000								\$7,000	\$7,000	\$7,000	\$7,000
14A Elevator	\$108,000								\$108,000	\$108,000	\$108,000	\$108,000
31B Excavation and Backfill	\$92,500	\$198,240	\$208,000	\$239,000	\$439,000				\$235,348	\$92,500	\$198,240	\$198,240
BID PACKAGE 3												
4B Masonry Veneer	\$662,644	\$944,440	\$1,340,700						\$982,595	\$662,644	\$944,440	\$662,644
5C Steel Supply	\$192,700	\$193,290	\$216,000	\$228,900					\$207,723	\$192,700	\$193,290	\$192,700
5D Steel Erection	\$128,900								\$128,900	\$128,900	\$128,900	\$128,900
6A Carpentry	\$313,900	\$315,000	\$393,000	\$416,300					\$359,550	\$313,900	\$315,000	\$313,900
7C Caulking	\$48,000								\$48,000	\$48,000	\$48,000	\$48,000
7D Metal Wall Panels	\$934,934	\$990,000							\$962,467	\$934,934	\$990,000	\$934,934
8A Doors, Frames & Hardware	\$195,123	\$209,014	\$210,306						\$18,389	\$195,123	\$209,014	\$195,123
8B Overhead Doors	\$17,995	\$18,783							\$17,995	\$17,995	\$18,783	\$17,995
8C Aluminum Curtain Wall, Entrances & Glazing	\$981,145	\$1,147,500							\$1,064,323	\$981,145	\$1,147,500	\$981,145
8D Translucent Skylight & Window Panels	\$25,993								\$25,993	\$25,993	\$25,993	\$25,993
9B Gypsum Systems	\$1,005,000	\$1,132,700	\$1,269,000	\$1,649,700					\$1,264,100	\$1,005,000	\$1,132,700	\$1,005,000
9C Tilework	\$149,000	\$164,350	\$171,600	\$190,750					\$168,925	\$149,000	\$164,350	\$149,000
9D Floor Coverings	\$298,000	\$301,405	\$302,342						\$300,582	\$298,000	\$301,405	\$298,000
9E Terrazzo Flooring	\$261,000	\$488,885	\$615,000						\$454,952	\$261,000	\$488,885	\$261,000
9F Acoustical Ceilings	\$304,500	\$369,675	\$490,000						\$304,500	\$304,500	\$369,675	\$369,675
9G Painting	\$164,350	\$186,900	\$202,268	\$231,272					\$196,198	\$164,350	\$186,900	\$164,350
9H Wood Flooring	\$115,300	\$134,118	\$138,000						\$129,139	\$115,300	\$134,118	\$115,300
9I Synthetic Sport Flooring	\$21,700	\$24,295	\$28,630						\$24,942	\$21,700	\$24,295	\$21,700
10C Lockers	\$82,700	\$88,961							\$85,831	\$82,700	\$88,961	\$82,700
10D Paired Partitions	\$280,393								\$280,393	\$280,393	\$280,393	\$280,393
10E Signage	\$14,153								\$14,153	\$14,153	\$14,153	\$14,153
11A Athletic Equipment	\$81,850	\$102,877							\$92,364	\$81,850	\$102,877	\$81,850
11B Bleachers	\$10,813	\$12,785							\$11,789	\$10,813	\$12,785	\$10,813
11C Scoreboards	\$8,000								\$8,000	\$8,000	\$8,000	\$8,000
12A Casework	\$474,785	\$539,355	\$539,355						\$507,070	\$474,785	\$539,355	\$474,785
12B Window Treatments	\$281,809	\$288,300							\$285,055	\$281,809	\$288,300	\$281,809
21A Fire Suppression	\$16,000								\$16,000	\$16,000	\$16,000	\$16,000
22A Plumbing	\$145,300	\$163,790	\$180,000	\$181,200	\$187,600	\$198,400	\$303,345		\$194,234	\$145,300	\$163,790	\$145,300
23A HVAC	\$874,100	\$1,068,000	\$1,070,000	\$1,104,000	\$1,134,999	\$1,183,000	\$1,338,000		\$1,110,300	\$874,100	\$1,068,000	\$874,100
25A Integrated Automation	\$2,728,000	\$2,889,400	\$3,116,000	\$3,333,000	\$3,357,000	\$3,360,000			\$3,130,567	\$2,728,000	\$2,889,400	\$2,728,000
25A Electrical Communications Safety & Security	\$452,835	\$2,261,000	\$2,350,000	\$2,374,243	\$2,498,000				\$2,305,649	\$2,045,000	\$2,261,000	\$2,045,000
BID PACKAGE 4												
32A Site Concrete	\$278,000	\$294,962	\$318,650	\$361,500					\$313,278	\$278,000	\$294,962	\$278,000
32B Asphalt Paving and Exterior Signage	\$380,788	\$389,150							\$384,969	\$380,788	\$389,150	\$380,788
32C Landscaping & Irrigation	\$251,328	\$265,482	\$218,900	\$292,735	\$292,300	\$320,000	\$374,200		\$291,818	\$251,328	\$265,482	\$251,328
32D Fencing and Site Furnishings	\$52,634	\$59,375	\$88,000						\$66,670	\$52,634	\$59,375	\$52,634
TOTALS									\$23,305,248	\$19,656,123	\$22,098,971	\$19,911,416

Note: Results do not include proposed alternates or unit prices.

Competitive Bid Savings = \$3,393,832
 % Savings = 17.04%
 Number of Contractors Called = 244
 Number of Exchanges = 14
 Number Of Contractors Interested = 250
 Number of Bids Received = 155

Sibley East Public Schools



Project started: November 21
Completed: August 21

Project

110,880 ft.² new elementary school

AREAS

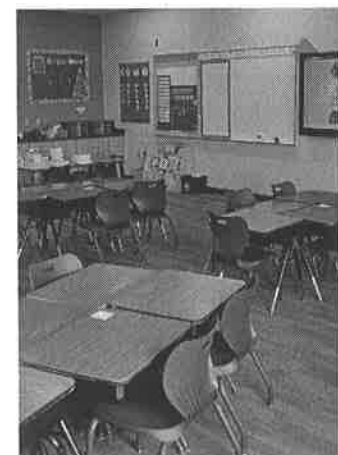
schools, parking lots, play fields and playgrounds

BUDGET	FINAL COST
\$18,493,287	\$18,124,911

A new school in time for back-to-school

The Sibley East school district includes nearly 1,200 students who attend the elementary school (pre-K through fifth grade) in Gaylord and secondary school (grades six through 12), located about 8 miles away in Arlington. A portion of the secondary building dates back to 1935; by 2008, both schools needed attention. The elementary school required new construction, including parking lots, play fields and playground areas.

After a number of unsuccessful attempts at referendums to address the school structures, the district enlisted R.A. Morton to facilitate a new facilities and referendum planning process. R.A. Morton worked directly with the district and the architect to determine the project scope and referendum plan.



"R.A. Morton helped us with estimates that made the budget work within the spirit of the design. They also helped us work through issues, such as a lawsuit from a community member to halt the project."

— JIM AMSDEN
Superintendent, Sibley East Public Schools

"We used post-referendum surveys, community task force meetings and other research to develop a new elementary school plan our community could support," explains Superintendent Jim Amsden.

A referendum passed in November 2014, and Sibley East wanted the new school construction completed in time for back-to-school in the fall of 2017.

"R.A. Morton helped us with estimates that made the budget work within the spirit of the design," Jim continues. "They also helped us work through issues, such as a lawsuit from a community member to halt the project."

R.A. Morton also provided temporary power so an issue with installing new power didn't delay construction and worked through contractor manpower issues.

Sibley East now has a new elementary school, including parking lots, play fields and playground areas.

R.A. Morton contributions

- Pre-Referendum Planning
- Estimating
- Competitive Bid
- Value Engineering
- Alternate Funding Suggestions
- On-Site Construction Management – Full-Time
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout

Step by step to the first day

"R.A. Morton's collaborative nature helped make our project a positive experience. Our teachers, staff members, students and families are impressed with our new elementary school, and we're pleased with the process, from pre-referendum to planning, bidding and overall construction management," Jim says.



St. Cloud Public Schools



Design phase: November 2014 –
February 2016
Bid Phase: March 2017
Construction Phase: April 2017 –
August 2018
Completed: August 2018

Project

New Quarryview Education Center: 68,630 ft.²

AREAS

New space for early childhood, adult and community education, parking lots, play fields, and playgrounds

BUDGET	FINAL COST
\$14,800,000	\$14,576,297

Up from the ashes

When fire destroyed its early childhood education center in June 2014, the St. Cloud school district relocated those teaching and learning areas to various other locations while planning a new facility.

"The new building was originally planned for the Clark Field site next to Tech High School, but community members organized efforts to keep Clark Field as it was, so the project was relocated to Waite Park," explains Superintendent Willie Jett.

R.A. Morton had submitted previous proposals to the district for other projects and contacted the district as this project was in the planning phases.

The district selected R.A. Morton and pre-construction planning began, including cost estimating, scheduling and product selection. R.A. Morton handled budget and timeline updates when the site changed.

"right from the start"



"R.A. Morton was even part of the team as we established the budget, and they helped complete estimates that enabled us to meet that budget."

— WILLIE JETT
Superintendent, St. Cloud Public Schools

"R.A. Morton was even part of the team as we established the budget, and they helped complete estimates that enabled us to meet that budget," Willie says.

"We wanted a facility that was conducive to learning, secure and as energy efficient as possible – and we wanted construction complete in time for back-to-school in the fall of 2018."

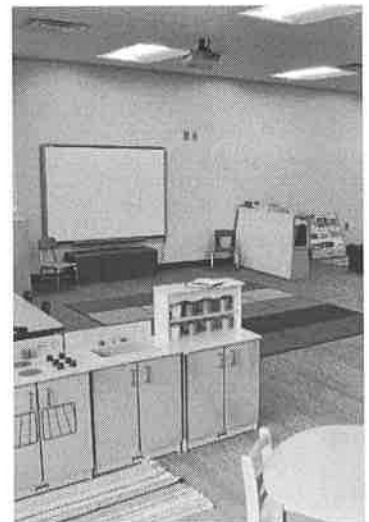
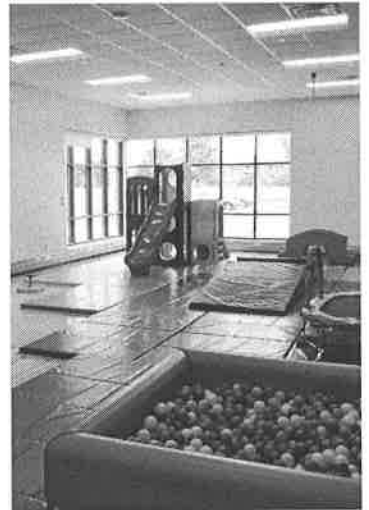
Customized to your community

"Like other educational systems, we are more than just buildings and facilities," Willie explains. "We are all about teaching, learning and we have a deep commitment to our community. Preston and the R.A. Morton team understood that and incorporated our expertise in those areas into the project."

"They were part of many facets of this project, from large group presentations to one-on-one discussions with school board members and other individuals."

R.A. Morton contributions

- Estimating
- Competitive Bid
- Value Engineering
- On-Site Construction Management – Full Time
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout



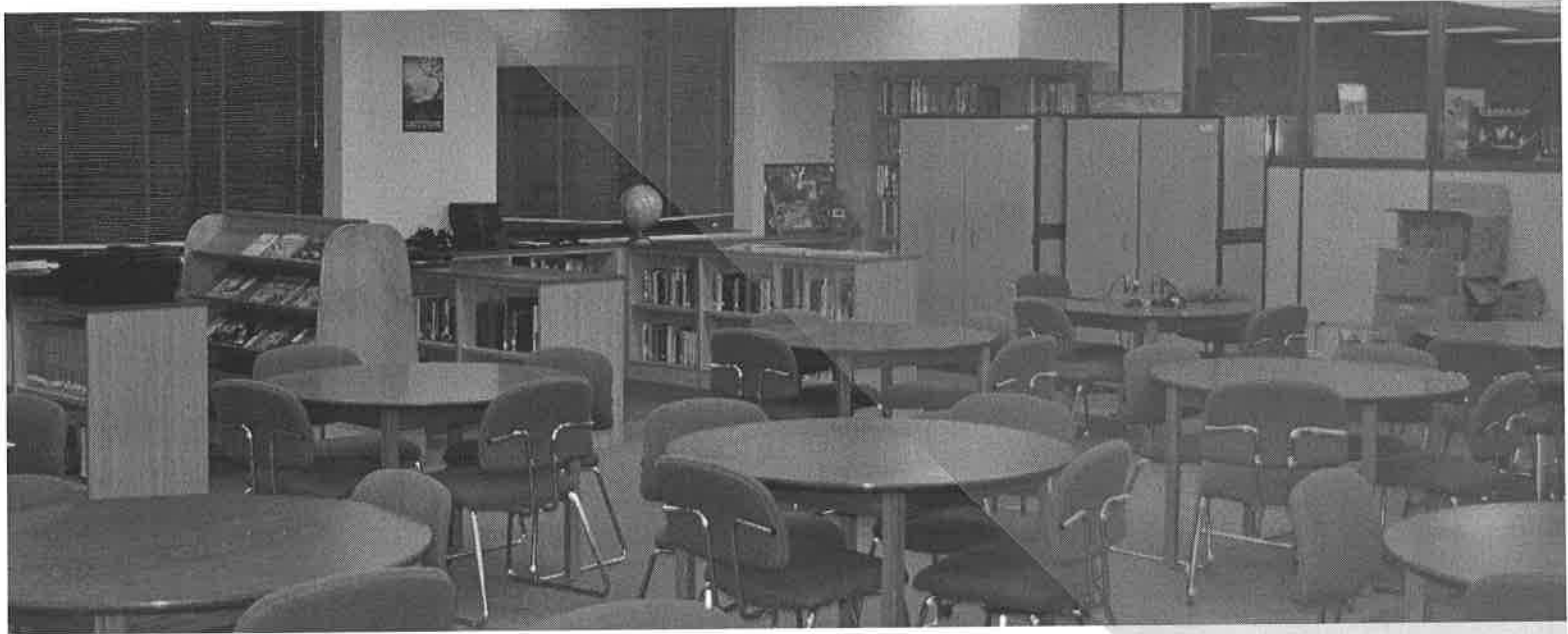
Customized to your community

"R.A. Morton was a collaborative partner throughout this process, including its changes along the way. They took the time to understand our needs and concerns, then helped customize this new Education Center for our students, staff members, families and the community," Willie explains.



"right from the start"

Willow River Public Schools



Project started: February 21
Completed: October 21

Project

Renovations, upgrades and replacements throughout the 1959, 1989 and 1994 additions

AREAS

HVAC and controls, boilers, fire sprinkler system, bathrooms, ceiling systems, electrical service, light fixtures and control systems, and roofing

BUDGET	FINAL COST
\$6,360,550	\$5,178,465

Maintenance for the long run

Every corner of school facilities is heavily used, so school districts must maintain their buildings, from boiler rooms to the rooftops. Willow River Public Schools has 500 students in its pre-K through 12th grade school. As Superintendent Bill Peel explains, "It's a building with a series of additions. The oldest remaining section dates back to 1954, and the boiler and utility room areas go back to the 1920s."

In this project, Willow River planned to utilize its Long Term Facilities Maintenance funding for upgrades to their HVAC, controls, roofing, lighting and bathroom facilities. The school board asked the interim superintendent at the time, who is now retired, to engage firms to help them plan and organize a project for board approval. The district's financial consultant recommended R.A. Morton to help plan and manage the project.



"Using R.A. Morton as our construction management firm was a smooth process. They guided contractors and kept us informed along the way."

— BILL PEEL

Superintendent, Willow River Public Schools

The most recent project included upgrading most of the roof, upgrading to LED lighting, replacing ceiling systems, plus upgrading the HVAC and enhancing the fire suppression system.

Construction began just as school let out in the spring, with the timeline set for most work to be done by back-to-school 2017. Some mechanical and roofing work was scheduled for completion by mid-October. "Using R.A. Morton as our construction management firm was a smooth process. They guided contractors and kept us informed along the way," Bill says.

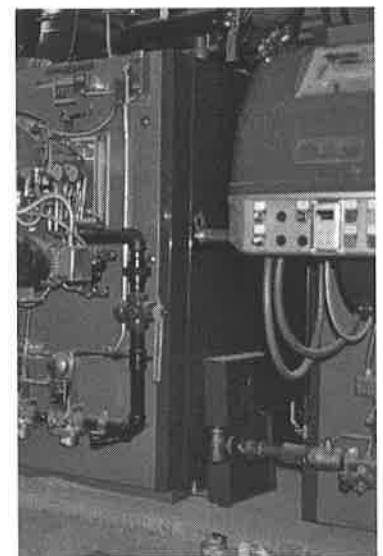
Some of the building's existing conditions did not match the plans for that work, so R.A. Morton and the district addressed those items quickly and cost effectively to stay on schedule and budget. Plus, most bids came in under budget, so the district was able to add scope to the project.

R.A. Morton contributions

- Facility Analysis Planning
- Estimating
- Competitive Bid
- Value Engineering
- On-Site Construction Management – Full-Time
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout

Set for the future

After a busy summer, work was done in time for the first day of school. "Our teachers, staff members and school families are very satisfied with the upgrades," Bill says. "We now have better lighting, better air flow and more efficient heating and cooling. We had community members come see the new building and shared information on exactly what we upgraded. Thanks to this maintenance project, our school building is now set for the future."



Pierz Public Schools



Project started: February 2016
Completed: October 2016

Project

9,810 ft.² elementary school kindergarten room addition
4,022 ft.² middle/high school choir room addition
12,269 ft.² fitness room addition

AREAS

elementary classrooms, choir room, fitness room, new tennis courts

BUDGET	FINAL COST
\$5,477,114	\$5,475,579

Thriving through school investments

"If you want your town to thrive, invest in your schools," says Superintendent George Weber. Community members of this 1,250-student district seem to agree, having approved several referendums, including the most recent one to simply renew an existing bond. The district also attracts many students through open enrollment due to its high test scores and strong athletics, theater, music and other programs.

Pierz has Pioneer Elementary (pre-K through sixth grade) and Healy High School (grades seven through 12), both located on the same campus. "It's very efficient, allowing us to share services such as custodial and foodservice," George explains.

R.A. Morton has worked with Pierz Public Schools on multiple projects since 2004. The gymnasium, added in 2005, was named WCCO Viewers' Choice For Best High School Gym In Minnesota in 2016.



When the project work began, "we had four projects simultaneously underway. R.A. Morton bid contractors work together for the most efficient use of our timeline and budget."

— GEORGE WEBER
Superintendent, Pierz Public Schools

The most recent project involved additions to three separate parts of their buildings, along with site work on tennis courts and the parking lot. It was a tight timeline to get the kindergarten classrooms open for the start of school. Even though the referendum was simply a renewal, R.A. Morton helped with pre-referendum planning, including community meetings to build and solidify support for the project.

When the project work began, "we had four projects simultaneously underway," George says. "R.A. Morton bid contractors work together for the most efficient use of our timeline and budget."

R.A. Morton contributions

- Pre-Referendum Planning
- Estimating
- Competitive Bid
- Value Engineering
- Alternate Funding Suggestions
- On-Site Construction Management – Full-Time
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout

Pierz pride

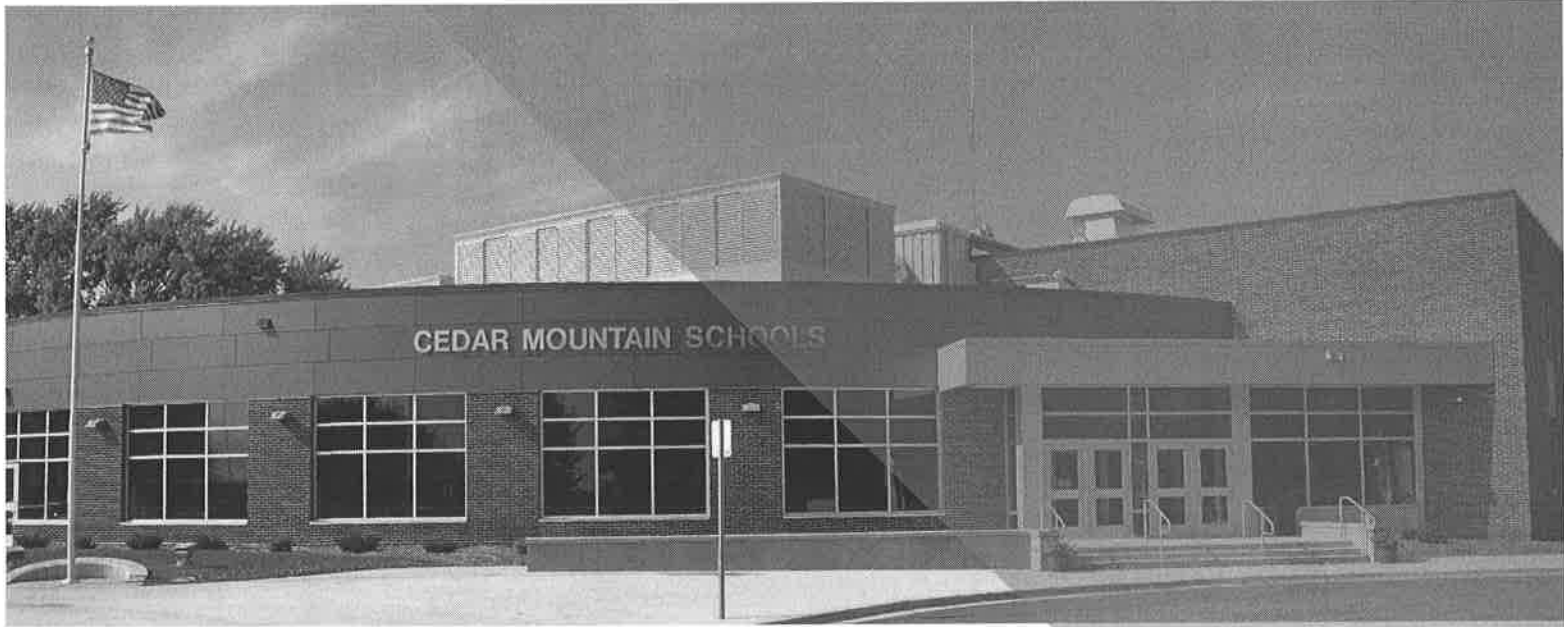
The kindergarten classrooms were finished in time for back-to-school, and other parts of the project were done on time.

"The students have great pride in the beautiful new choir room and remarkable fitness center," George says.

Pierz continues to thrive, and R.A. Morton is looking forward to collaborating with the district on further upgrades and additions.



Cedar Mountain Public Schools



Project started: October 2014
Completed: August 2015

Project

22,200 ft.² addition 4,300 ft.² remodel

AREAS

kitchen, commons, administrative offices, classrooms, media center, HVAC upgrades, add fire sprinklers to the existing building; kitchen upgrade at Franklin Elementary

BUDGET

\$9.6 million

FINAL COST

\$9.264 million

Balancing history with modern needs

One of Cedar Mountain Public Schools' buildings was first completed in 1896. There had been additions and remodels along the way, yet the district had "kicked the can down the road long enough," in the words of a school board member, as quoted by Superintendent Bob Tews.

Bob explains further: "We wanted to balance the historic value of the facility with our needs for modern education. By the time we sought a construction management firm, we were on "Plan K" from our architects. Our referendum vote had received 74 percent "yes," so we had good community support.

"We interviewed three construction management firms. R.A. Morton was not the lowest bid, but we established a good connection with their team."

Ideas to solve challenges

That teamwork became vital as the project began. The budget had been set before R.A. Morton started working on the project, yet as estimates came in, it was clear the project would exceed the set budget.

"right from the start"



"R.A. Morton listened to concerns from our team, including our school board members, then brought us ideas. One solution was to secure alternative facilities bonds to supplement the budget. R.A. Morton's connections were vital to making this work. They also ensured that work stayed on schedule, including inspections to help us open in time for the first day of school that fall."

— BOB TEWS

Superintendent, Cedar Mountain Public Schools

R.A. Morton contributions

- Estimating
- Value Engineering
- Alternate Funding Suggestions
- On-Site Construction Management – Full-Time
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout



Step-by-step to the first day

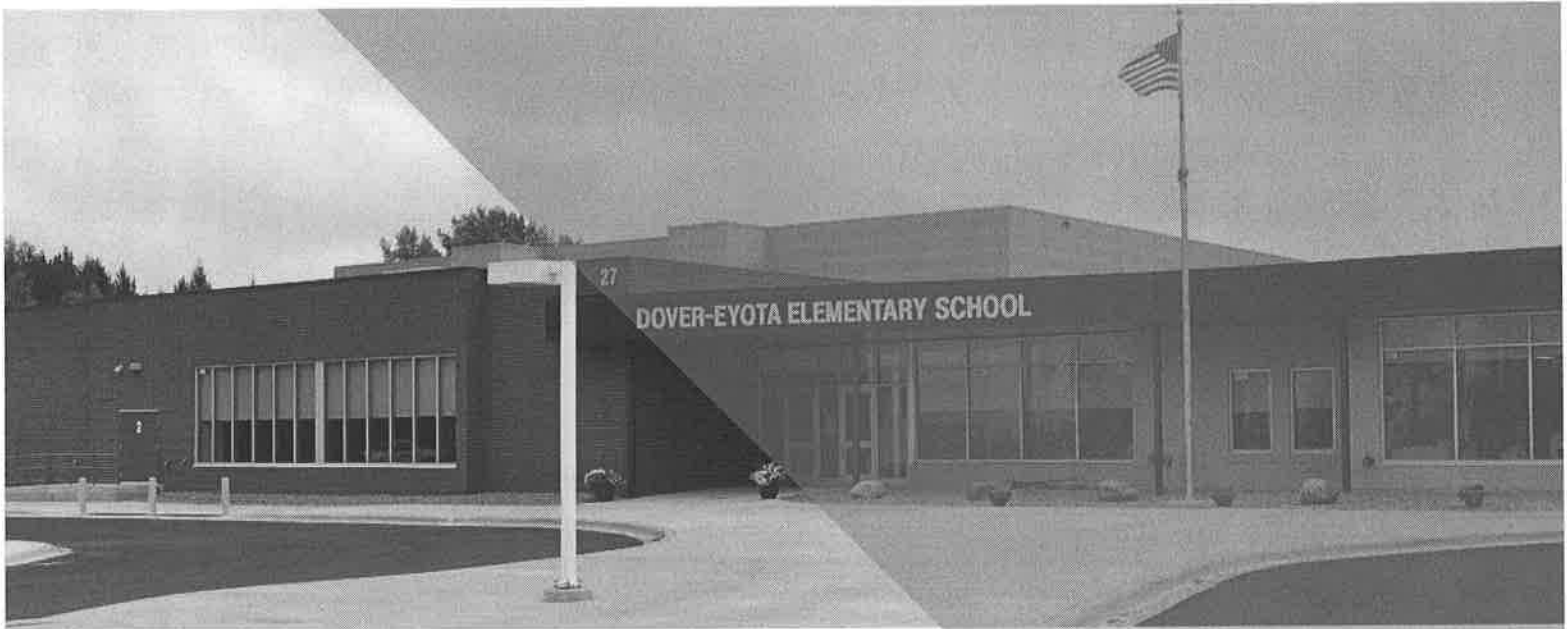
"R.A. Morton was truly part of our team. We met weekly for most of the project, and one of their staff members really became part of our community. They also took care of the tough work in keeping the project within its tight schedule and set budget," Bob explains.

School started on time at Cedar Mountain that fall in upgraded and enhanced facilities. That's balancing history with modern needs.



"right from the start"

Dover-Eyota Public Schools



Referendum: May 2014
Design: May – January 2015
Bid phase: February 2015
Project started: April 2015
Completed: January 2016

Project

19,092 ft.² addition 14,960 ft.² remodel

AREAS

new kitchen, cafeteria, administrative offices, early childhood classrooms, storage; renovated art and music rooms

BUDGET	FINAL COST
\$7.632 million	\$7.218 million

Addressing broader educational needs

The Dover-Eyota school district had an increased need for early childhood education and other areas, and its 90-year-old school building in Dover wasn't efficient to upgrade.

"Our goal was to address as many needs as possible in our renovations and new construction," explains Superintendent Bruce A. Klaehn, now retired, although he agreed to stay on throughout the district's renovation and new construction project. "R.A. Morton helped us prepare for the referendum, which passed with 65 percent approval."

Ideas to solve challenges

As R.A. Morton reviewed the budget established by the architect and completed estimates, it determined the project would exceed the budget due to added square footage. R.A. Morton suggested revising the amount of square footage of new construction and remodel to the amounts that were later proposed on the referendum.



"The R.A. Morton team brought us other ideas throughout the process, kept the project on track, and generated helpful reports along the way."

— BRUCE A. KLAEHN
Superintendent, Dover-Eyota School District

R.A. Morton contributions

- Pre-Referendum Services
- Estimating
- Competitive Bid
- Value Engineering
- On-Site Construction Management – Full Time
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout



Handling all phases

The Dover-Eyota project included two phases and a broad range of renovations as well as new construction. "Our teachers, staff members, students and the community all favorably noticed the improvements throughout our facilities, and we were satisfied with how they handled the project," Bruce says. "The project finished under budget and in time for classes to begin in January."

From preschool education through high school graduation, students now have modernized facilities for the district's broad range of education and related services.



Hawley Public Schools



Project

41,372 ft.² addition 4,068 ft.² remodel

AREAS

high school and elementary school classrooms, gymnasium, walking track, fitness room, locker rooms, storage, heat pump replacement; renovated elementary school music room, high school locker rooms and bathrooms

BUDGET

\$11.635 million

FINAL COST

\$11.615 million

Referendum: November 2013
Design: November 2013 – March 2014
Bid phase: April 2014
Construction: June 2014 –
September 2015

Responding to community, district

Hawley Public Schools needed new and upgraded space for a wide variety of academic and athletic areas. "Our district developed a needs assessment, then a plan, then R.A. Morton helped set our budget in pre-referendum planning," says Superintendent Phil Jensen. "They were very responsive to our community, task force and district leaders throughout the process – even shifting some personnel to ensure strong teamwork and productive connections."

Phil explains further: "R.A. Morton was very organized and kept people informed along the way. Our referendum vote received 89 percent 'yes,' yet we wanted a tax-neutral budget while also prioritizing our needs and wants. Plus, we wanted to open in time for back to school 2015."

Workforce, contractor challenges

As the project progressed, it became clear that the labor force in the Hawley (Fargo–Moorhead) area was very busy, so securing proper manpower to the Hawley school sites was challenging at times. In addition, one contractor was deficient in completing its work, which delayed other contractors from finishing work as scheduled. In these and other situations, R.A. Morton worked through the details to find solutions.

"right from the start"



"R.A. Morton was very organized and kept people informed along the way. Our referendum vote received 89 percent 'yes,' yet we wanted a tax-neutral budget while also prioritizing our needs and wants. Plus, we wanted to open in time for back to school 2015."

— PHIL JENSEN
Superintendent, Hawley Public Schools

The project encompassed diverse additions and renovations from doubling the size of the agricultural shop to a new band room, remodeled locker rooms and more efficient heat pump systems.

"Our staff, task force and community were very impressed with the results of the project," Phil says. "Especially senior citizens in the area, who were proud to upgrade the schools where many of them attended and now have grandkids who learn and play in the classrooms and music and athletic facilities."

R.A. Morton contributions

- Facility Analysis
- Pre-Referendum Planning
- Estimating
- Competitive Bid
- Value Engineering
- On-Site Construction Management – Full-Time
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout

School started on time in Hawley that fall, including Friday night games on the renovated football field! That's responding to community needs.



"right from the start"

Lakeview Public Schools



Referendum: May 2014
Design: May – August 2014
Bid phase: July – September 2014
Construction: October 2014 –
August 2015

Project

29,200 ft.² addition 11,660 ft.² remodel

AREAS

elementary and early childhood classrooms, community education areas, administrative offices, storage; new gymnasium with multi-purpose flooring in elementary school; revamped entrances; renovated science rooms, special education areas, FACS rooms and fitness areas

BUDGET	FINAL COST
\$8,000,000	\$7,583,124

Growing in the right directions

Lakeview built a brand new K-12 school in 2002, designed to handle 550-600 students in and around Cottonwood, Minnesota. "By 2013, we were outgrowing those facilities, with more growth on the horizon. Plus, we needed to upgrade and enhance certain areas to accommodate our changing needs," says Superintendent Chris Fenske.

In 2002, the district had used a general contractor. Eleven years later, R.A. Morton had the opportunity to provide pre-referendum and construction management services.

Starting right

"R.A. Morton had worked with our project architect, who was also the architect in our 2002 project. That was especially beneficial, as was R.A. Morton's help in our pre-referendum stage. They helped define the plan to gather community input, helped facilitate some task force meetings and helped guide our efforts to stay transparent."

"right from the start"



"During the bid phases, R.A. Morton helped determine which scopes of work went into each bid package and built timelines and other details for the project that helped us keep our staff members and the community accurately informed."

— CHRIS FENSKE
Superintendent, Lakeview Public Schools

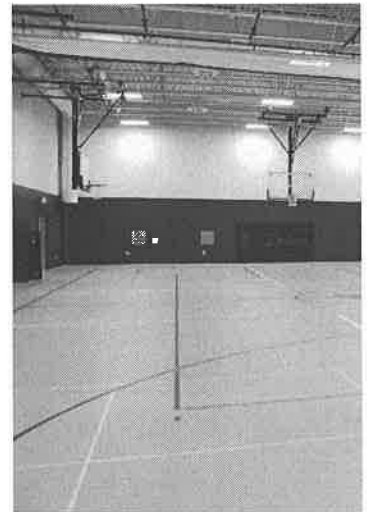
"Once we'd arrived at a plan that the community would support, we held two public meetings, and our referendum vote received 75 percent 'yes,'" Chris explains.

"During the bid phases, R.A. Morton helped determine which scopes of work went into each bid package and built timelines and other details for the project that helped us keep our staff members and the community accurately informed."

R.A. Morton also helped guide efforts to incorporate energy efficient lighting, energy rebate packages and other beneficial components.

R.A. Morton contributions

- Pre-Referendum Planning
- Estimating
- Competitive Bid
- Value Engineering
- On-Site Construction Management – Full-Time
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout



Growth is good

"As our area continues to grow, we now have more space to accommodate a broader range of academics and athletics," Chris says.

The upgraded and enhanced Lakeview school district facilities are allowing the entire area around Cottonwood to grow in the right directions.



"right from the start"

Renville County West



Project

23,700 ft.² addition

AREAS

six elementary classrooms, gymnasium, locker rooms, fitness areas, restrooms, bus drop area

BUDGET	FINAL COST
\$5,246,540	\$4,921,540

Referendum: January 2015
Design: January – July 2015
Bid phase: August 2015
Project started: September 2015
Completed: September 2016

Twice as nice

Renville County West wanted to keep its K – 12 building, originally constructed in 1921, yet needed an addition with diverse areas from classrooms to locker rooms to a bus drop area.

"We attempted a referendum in August of 2014, which included pre-referendum guidance from R.A. Morton," explains Superintendent Michelle Mortensen. An architect who had worked with R.A. Morton on the Lakeview Public School project recommended R.A. Morton.

"Since many residents just assumed it would be approved, our "Yes" committee wasn't really vocal, and the referendum failed by 84 votes.

"We turned around, actually increased the project budget to incorporate a few more needs, and in January, the second referendum passed by about 100 votes," Michelle says.

Renville's district includes about 500 students, which can shift depending on the migrant workers and their families in the area (Renville is in west central Minnesota's rich agricultural region).

"right from the start"



"Our project involved two areas under construction at the same time, yet we wanted to be open by the first day of school in September 2016. R.A. Morton helped us stay on track: At some points we were actually far ahead of schedule. I appreciated how R.A. Morton kept me informed throughout the process, so I could then keep our staff updated. R.A. Morton even helped facilitate some walk-throughs for our teachers and staff members."

— MICHELLE MORTENSEN
Superintendent, Renville County West

R.A. Morton contributions

- Facility Analysis
- Pre-Referendum Planning – Two Referendums
- Estimating
- Competitive Bid
- Value Engineering
- On-Site Construction Management
- Project Management
- Project Cost Accounting
- Budget Management
- Schedule Management
- Project Closeout

School started on time that fall in Renville. "Our entire community was excited to see the school addition and all its features," Michelle says. "We now have more space to educate, enlighten and grow. And that's good for all of us."



"right from the start"