

- Mission:** Lifelong learners will be inspired and developed through effective teaching in a safe and caring environment.
- Vision:** Respect – Pride – Excellence for All



AGENDA
BOARD OF EDUCATION – SPECIAL MEETING
Instructional Planning Center/Huron Arena
March 25, 2024
5:30 p.m.



1. **Call to Order**
2. **Roll Call**
3. **Pledge of Allegiance**
4. **Adoption of the Agenda**
5. **Dates to Remember**

March 29	No School – Holiday Break
March 30	School Board Election Forum – 9:00am – City Hall
April 1	No School – Vacation
April 8	Board of Education Meeting – 5:30 p.m. – IPC
April 9	School Board Election
April 10	Early Release
April 22	Board of Education Meeting – 5:30 p.m. – IPC
May 1	Early Release
May 13	Board of Education Meeting - 5:30pm – IPC
May 15	Baccalaureate – 8:00pm – Huron Arena
May 19	Graduation – 2:00pm – Huron Arena
May 28 (Tuesday)	Board of Education Meeting – 5:30pm – IPC
6. **Community Input on Items Not on the Agenda**
 - o See Policy BFB – **Public Participation at Board Meetings** – for more information
7. **Conflict Disclosure and Consideration of Waivers** – The School Board will review the disclosures and determine if the transactions or the terms of the contracts are fair, reasonable, and not contrary to the public interest.
 - a)
8. **CONSENT AGENDA**

The superintendent recommends approval of the following:

 - a) **Consideration and Approval of the Bills**
 - b) **New Hires to the District**

Classified personnel and substitute teachers must be approved in order to be covered by our workmen’s compensation plan.

 - 1) Josh Lien/Substitute Teacher - \$160 per day/Substitute Para-Educator - \$20.69 per hour
 - 2) Taylor Hornig/Substitute Nurse, District/ \$32.10 per hour
 - 3) Alicia Athey/Food Service, Lunch Prep-Cook – High School/\$20.04 per hour
 - 4) Katelyn Zutter/SPED Para – Buchanan/\$21.65 per hour
 - 5) Brooke Mitchell/SPED Para – Buchanan/\$20.69 per hour
 - 6) Wendy Brotherton/ Substitute Nurse, District/ \$32.10 per hour
 - c) **Resignations for Board Approval**
 - 1) Christi Lunders/Food Service, Lunch Server, High School/8 years
 - 2) Michelle Christopherson/Para Educator, Riverside Colony/1 year

- d) **Contracts for Board Approval**
1)
- e) **Classified Request to be Recognized for Negotiation Purposes:**
- Maintenance, Grounds & Custodial Personnel – Dean Hirschhorn, Chad Beck
 - Food Service Personnel – Vicky Davis, Drew Palmquist
 - Full-Time Personnel – Ashley Neuharth, Tiffany Nelson
 - Related Services Therapy Assistants – Quinn Reilly, Chantelle Kremer, Nakita Hoffman
 - Para Educators
 - Building Secretaries – Angie Boetel, Brittni Neuharth
 - Instructional Aides – Ann McLaurry, Peg Harkness, Jamie Kleinsasser, MaKiah Schweigert, Madison Vaudrin, Amy Hofer
- f) **Request Permission to Appoint the Following List of Individuals to Serve as Members of Two (2) Election Boards for the Upcoming Municipal Election on Tuesday, April 9, 2024:** Mary Fuchs, Rosie Harrington, Juanita Johnson, Joy Petersen, Janelle Bischoff, Carol Davis, Ardelia Reno, Peggy Bockorny, Larry Bockorny, Carol Tschetter
- g) **Intent to Apply for Grant Funding**
- | | |
|------------------------|---|
| Group Applying | Huron School District |
| Contact Person | Jolene Konechne |
| Name of Award | SD Workforce Education Grant |
| Name of Funder | SD DOE |
| Amount to be Requested | \$225,000 |
| Project Focus | expansion of Career & Technical Education (addition to existing HS) |
- h) **Intent to Apply for Grant Funding**
- | | |
|------------------------|---|
| Group Applying | Rebecca Neugebauer |
| Contact Person | Linda Pietz |
| Name of Award | American Bank & Trust Spirit Card |
| Name of Funder | American Bank & Trust |
| Amount to be Requested | \$500 |
| Project Focus | classroom supplies, rewards, incentives, improvements |
- i) **Intent to Apply for Grant Funding**
- | | |
|------------------------|--|
| Group Applying | Washington 4-5 Center, 4 th gr |
| Contact Person | Lexi Heinz |
| Name of Award | American Bank & Trust Spirit Card |
| Name of Funder | American Bank & Trust |
| Amount to be Requested | \$500 |
| Project Focus | Frindle classroom set, whiteboards/erasers, supplies, headphones, flexible seating |
- j) **Intent to Apply for Grant Funding**
- | | |
|------------------------|---|
| Group Applying | Mrs. Mudge's 4 th gr classroom |
| Contact Person | Nicholle Mudge |
| Name of Award | American Bank & Trust Spirit Card |
| Name of Funder | American Bank & Trust |
| Amount to be Requested | \$400 |
| Project Focus | purchase Chromebook charging cart & pencils |

- k) **Intent to Apply for Grant Funding**

Group Applying	Washington 4-5 Center
Contact Person	Sarah Miner
Name of Award	American Bank & Trust Spirit Card
Name of Funder	American Bank & Trust
Amount to be Requested	\$500
Project Focus	Who Was Book Set, Quizzes, Student White Boards
- l) **Intent to Apply for Grant Funding**

Group Applying	HMS Counseling Office
Contact Person	Taylor Kevan
Name of Award	It Gets Better Project
Name of Funder	It Gets Better Nonprofit
Amount to be Requested	\$10,000
Project Focus	helping to create an inclusive environment for all students
- m) **Request to Approve Letter of Agreement between CORE Educational Cooperative and the Huron School District**
- n) **Request by the James River Oddfellow Lodge #32** to rent a school bus Sunday, June 9, 2024 to host a Cemetery Tour. The Oddfellow Lodge will pay the in town rate of \$60 and \$35 per hour for driver
- o) **Request for Approval of Open Enrollment**
 The administration has received open enrollment request #OE-2024-06 & #OE-2024-07 for Board approval

(The consent agenda may be approved with one motion. However, if a board member wishes to separate an item for discussion, he/she may do so.)

9. CELEBRATE SUCCESSES IN THE DISTRICT

Congratulations to:

- **Blake Ellwein** (10 gr) selected to the 2024 AA BBB All-Tournament Team
- **Terry Rotert** (Activities Director) for being selected for induction to the SDHS Golf Coaches Hall of Fame. The induction ceremony will be held June 4th at State Golf

Thank You to:

- April 1-5 is National Assistant Principals Week
- April 3 is Paraprofessional Appreciation Day
- April 4 is School Librarian Appreciation Day
- Auto Body Clinic for the goodie bags given to the teachers & staff at Buchanan K-1 Center, Madison 2-3 Center, Washington 4-5 Center, Middle School & High School for St. Patrick's Day

10. REPORTS TO THE BOARD:

- a) **Classified Employee of the Month** – Presented by Kathie Bostrom
Rollie Hotchkin, Substitute Bus Driver at Transportation has been selected as **Classified Employee of the Month for May 2024**. Nomination comments are included in this packet. Congratulations Rollie!
- b) **Good New Report – Madison 2-3 Center: Angel Hovde - Kaiden Caudell, Nakia Mohr / Holly Cundy - MacKenzie Hershman / Kate Ashbaugh - Alivia Cunard**
- c) **Superintendent's Report**

11. **OLD BUSINESS**

- a) Policy GCBDD-Military Leave – 2nd reading
- b) **Contract for Construction Manager at Risk Services with Puetz Design + Build**
for an addition and remodeling at the High School

12. **NEW BUSINESS**

- a)

13. **EXECUTIVE SESSION**

1-25-2 Executive or closed meetings may be held for the sole purposes of:

- (4) Preparing for contract negotiations or negotiating with employees or employee representatives.

14. **ADJOURNMENT**

<u>Vendor Name</u>		<u>Vendor Description</u>	<u>Amount</u>	
Checking	1			
Checking	1	Fund: 10 GENERAL FUND		
BEADLE COUNTY SHERIFF'S OFFICE		REPAIRS	50.00	
FREEMAN, JR., RODNEY		LEGAL SERVICES	1,100.00	
HOLFORTY, JAMIE		INCENTIVE	125.00	
HURON REGIONAL MEDICAL CENTER		PROF SVC	600.00	
MCKINLEY LEARNING CENTER		TUITION	160.00	
MG OIL COMPANY		SUPPLIES	14,558.85	
NORTHWESTERN ENERGY		UTILITIES	2,655.29	
SDN COMMUNICATIONS		COMMUNICATIONS	761.40	
VENTURE COMMUNICATIONS		LINE CHARGES	19.79	
		Fund Total:		20,030.33
Checking	1	Fund: 22 SPECIAL EDUCATION FUND		
CHILDREN'S HOME SOCIETY		PROF SVC	3,307.73	
LIFESCAPE		TUITION	140.00	
SHERATON SIOUX FALLS		TRAVEL	1,094.00	
		Fund Total:		4,541.73
		Checking Account Total:		24,572.06

Halbkat, Darla

Subject: Resignation

From: Reilly, Amanda <Amanda.Reilly@k12.sd.us>
Sent: Wednesday, March 13, 2024 7:44 AM
To: Halbkat, Darla <Darla.Halbkat@k12.sd.us>
Subject: Resignation

Christi Lunders resigned Tuesday, March 12.
Thank you.

Amanda Reilly, Nutrition Director

Huron School District

1045 18th Street SW

Huron, SD 57350

(605)353-6909



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Halbkat, Darla

Subject: FW: Resign

From: "Christopherson, Michelle" <Michelle.Christopherson@k12.sd.us>
Date: March 16, 2024 at 11:13:27 AM CDT
To: "Mittelstedt, Rodney" <Rodney.Mittelstedt@k12.sd.us>
Subject: Resign

I resign from para at Riverside Colony as of 3-16-24.

Thank you.

Michelle Christopherson
Riverside Colony Para-Educator
Huron School District 2-2

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Huron School District

PO Box 949
150 5th St. SW
Huron, SD 57350

Date: 13 March 2024

Dear Board Members & Dr. Steinhoff:

On behalf of the maintenance, grounds and custodial staff Chad Beck and Dean Hirschhorn are requesting to be recognized by the school board as a bargaining unit for the 2024/2025 school year negotiations.

Sincerely,


Chad Beck


Dean Hirschhorn





School Nutrition Office
1045 18th St. SW
Huron, SD 57350
Phone: (605) 353-6909

March 7, 2024

Board of Education
Dr. Kraig Steinhoff

Dear Dr. Steinhoff,

The school nutrition department of the Huron Public Schools requests recognition as a bargaining unit for the 2024-2025 school year.

Thank you,
Vicky Davis, Cashier/Administrative Assistant

Vicky Davis

Drew Palmquist, Trainer Coordinator


School Nutrition Office



Ashley Neuharth
Payroll
150 5th St. SW
Huron, SD 57350
P: (605) 353-6995
F: (605) 353-6994
ashley.neuharth@k12.sd.us

March 7, 2024

Board of Education Members
Dr. Kraig Steinhoff
Huron School District
Huron, SD 57350

Dear Board Members and Dr. Steinhoff:

The full time Classified, Class I employees of the Huron School District request recognition as a bargaining unit for the 2024-2025 school year.

Thank you.

Sincerely,

Ashley Neuharth and Tiffany Nelson
Administrative Assistants



District Wide Related Services
705 Dakota Ave N
Huron, SD 57350
Phone: (605) 353-6997

March 18, 2024

Board of Education
Dr. Kraig Steinhoff

Dear Dr. Steinhoff,

The related services therapy assistants of the Huron Public Schools requests recognition as a bargaining unit for the 2024-25 school year.

Thank you,
Quinn Reilly, COTA

Chantelle Kremer, RPTA

Nikita Hoffman, SLPA

Related Services, Therapy Department



March 18, 2024

To Whom It May Concern:

On behalf of the Class II Office Secretaries for the elementary schools/middle school/business office, we are requesting to be recognized by the school board as a bargaining unit for the 2024-25 school year negotiations.

Sincerely,

Angie Boetel
Madison 2-3 Center

School District

PO Box 949
150 5th St. SW
Huron, SD 57350

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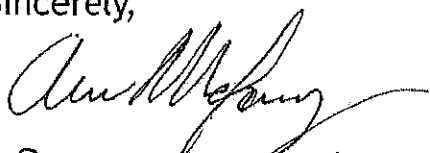
Date: 3/13/24

Dear Board Members & Dr. Steinhoff:

On behalf of Class II A Para Educators

we are requesting to be recognized by the school board as a bargaining unit for the 2024-2025 school year negotiations.

Sincerely,



Para Negotiations Team

Ann McLaury Peg Harkness Jaime Kleinsasser
Makiah Schweigert Madison Vaudrin Amy Hofer



Business Office

150 5th St. SW
PO Box 949
Huron, SD 57350-0949
P: (605) 353-6995
F: (605) 353-6994

Please accept the following list of individuals to be appointed to serve as members of two (2) Election Boards for the upcoming Municipal election on Tuesday, April 9, 2024:

Mary Fuchs

Peggy Bockorny

Carol Davis

Joy Petersen

Rosie Harrington

Larry Bockorny

Ardelia Reno

Janelle Bischoff

Juanita Johnson

Carol Tschetter

Election workers will be paid a total of \$250 for the election day and election school hours.



Linda J Pietz
Director of Curriculum,
Instruction & Assessment
Linda.Pietz@k12.sd.us

SCHOOL DISTRICT

INTENT TO APPLY FOR GRANT FUNDING

Any person or group applying for grant funds is expected to complete this form prior to submitting any grants or requesting funds that will impact the Huron School District.

Date: 3/14/2024 Contact Person: Jolene Konechne

Group Applying: Huron School District

Name of Grant/Award: SD Workforce Education Grant

Name of Funder: SD DOE Contact Person Jamie Boettcher

Amount to be Requested: \$225,000 Funder's Submission Due Date: 3/29/2024

Project Focus: Expansion of Career & Technical Education (addition to existing HS)

How awarded amount received? _____ Full amount up front xx Reimbursement

Are any follow up reports required? _____ Yes x No If yes, when are they due? _____

Is any District funding, resource, or in-kind commitment required now or in the future? Yes x No _____

If yes, please list by dollar amount and/or in-kind service/support. Please be specific. \$225,000 - capital outlay certificates

Please note:

- o Each school/individual will be responsible for submitting and following through on the grant application process unless other arrangements have been made.
- o A copy of the completed grant application must be available upon request.
- o The person or group applying will need to submit the following documentation to the business offices:
 - o If and when the grant is awarded, a copy of the award letter.
 - o If any follow-up reports are required, a copy of the report.

A copy of this request with signatures will be returned to the contact person above when the application is reviewed, allowing the application to proceed.

Signature: Jolene Konechne 3/14/2024
Building/Department Administrator Date

Signature: Linda J Pietz 3/14/2024
Linda J Pietz, Director of Curriculum, Instruction & Assessment Date

Signature: Kelly Christopherson 3-14-2024
Kelly Christopherson, Business Manager Date

Presented to School Board: _____



Linda J Pietz
Director of Curriculum,
Instruction & Assessment
Linda.Pietz@k12.sd.us

SCHOOL DISTRICT

INTENT TO APPLY FOR GRANT FUNDING

Any person or group applying for grant funds is expected to complete this form prior to submitting any grants or requesting funds that will impact the Huron School District.

Date: 3/12/24 Contact Person: Lexi Heinz

Group Applying: Washington 4-5 center, 4th grade

Name of Grant/Award: American Bank & Trust Spirit Card

Name of Funder: American Bank & Trust Contact Person: Whitney McDonald

Amount to be Requested: \$500 Funder's Submission Due Date: February 9th

Project Focus: Frindle classroom set, whiteboards and erasers, supplies, headphones, flexible seating

How awarded amount received? Full amount up front Reimbursement

Are any follow up reports required? Yes No If yes, when are they due? _____

Is any District funding, resource, or in-kind commitment required now or in the future? Yes No

If yes, please list by dollar amount and/or in-kind service/support. Please be specific.

Please note:

- o Each school/individual will be responsible for submitting and following through on the grant application process unless other arrangements have been made.
- o A copy of the completed grant application must be available upon request.
- o The person or group applying will need to submit the following documentation to the business offices:
 - o If and when the grant is awarded, a copy of the award letter.
 - o If any follow-up reports are required, a copy of the report.

A copy of this request with signatures will be returned to the contact person above when the application is reviewed, allowing the application to proceed.

Signature: Kari Harkin 3/13/24
Building/Department Administrator Date

Signature: Linda J Pietz 3/14/24
Linda J Pietz, Director of Curriculum, Instruction & Assessment Date

Signature: Kelly Christopherson 3-14-24
Kelly Christopherson, Business Manager Date

Presented to School Board: _____



Linda J Pietz
 Director of Curriculum,
 Instruction & Assessment
 Linda.Pietz@k12.sd.us

SCHOOL DISTRICT

INTENT TO APPLY FOR GRANT FUNDING

Any person or group applying for grant funds is expected to complete this form prior to submitting any grants or requesting funds that will impact the Huron School District.

Date: 3/12/24 Contact Person: Nicholle Mudge

Group Applying: Mrs. Mudge's 4th Grade Classroom

Name of Grant/Award: American Bank + Trust Spirit Grant

Name of Funder: American Bank + Trust Contact Person Whitney McDonald

Amount to be Requested: \$400 Funder's Submission Due Date: 2/9/24

Project Focus: Funds to purchase Chromebook Charging Cart/ Pencils

How awarded amount received? Full amount up front Reimbursement

Are any follow up reports required? Yes No If yes, when are they due? _____

Is any District funding, resource, or in-kind commitment required now or in the future? Yes No

If yes, please list by dollar amount and/or in-kind service/support. Please be specific.

- Please note:
- o Each school/individual will be responsible for submitting and following through on the grant application process unless other arrangements have been made.
 - o A copy of the completed grant application must be available upon request.
 - o The person or group applying will need to submit the following documentation to the business offices:
 - o If and when the grant is awarded, a copy of the award letter.
 - o If any follow-up reports are required, a copy of the report.

A copy of this request with signatures will be returned to the contact person above when the application is reviewed, allowing the application to proceed.

Signature: Kari Hunka 3/13/24
 Building/Department Administrator Date

Signature: Linda J Pietz 3/14/24
 Linda J Pietz, Director of Curriculum, Instruction & Assessment Date

Signature: Kelly Christopherson 3-14-24
 Kelly Christopherson, Business Manager Date

Presented to School Board: _____



Linda J Pietz
Director of Curriculum,
Instruction & Assessment
Linda.Pietz@k12.sd.us

SCHOOL DISTRICT

INTENT TO APPLY FOR GRANT FUNDING

Any person or group applying for grant funds is expected to complete this form prior to submitting any grants or requesting funds that will impact the Huron School District.

Date: 3-13-24 Contact Person: Sarah Miner

Group Applying: Washington 4-5 center

Name of Grant/Award: American Bank + Trust Spirit Card

Name of Funder: American bank + Trust Contact Person Whitney McDonald

Amount to be Requested: 500 Funder's Submission Due Date: _____

Project Focus: who was book set, Quizzes, student white boards,

How awarded amount received? Full amount up front Reimbursement

Are any follow up reports required? Yes No If yes, when are they due? _____

Is any District funding, resource, or in-kind commitment required now or in the future? Yes No

If yes, please list by dollar amount and/or in-kind service/support. Please be specific.

Please note:

- o Each school/individual will be responsible for submitting and following through on the grant application process unless other arrangements have been made.
- o A copy of the completed grant application must be available upon request.
- o The person or group applying will need to submit the following documentation to the business offices:
 - o If and when the grant is awarded, a copy of the award letter.
 - o If any follow-up reports are required, a copy of the report.

A copy of this request with signatures will be returned to the contact person above when the application is reviewed, allowing the application to proceed.

Signature: Keri Homer 3/18/24
Building/Department Administrator Date

Signature: Linda J Pietz 3/18/24
Linda J Pietz, Director of Curriculum, Instruction & Assessment Date

Signature: Kelly Christopherson 3-20-2024
Kelly Christopherson, Business Manager Date

Presented to School Board: _____



SCHOOL DISTRICT

Linda J Pietz
Director of Curriculum,
Instruction & Assessment
Linda.Pietz@k12.sd.us

INTENT TO APPLY FOR GRANT FUNDING

Any person or group applying for grant funds is expected to complete this form prior to submitting any grants or requesting funds that will impact the Huron School District.

Date: 3/14/24 Contact Person: Taylor Kewan

Group Applying: Huron middle school counseling office

Name of Grant/Award: It Gets Better Project (50 states, 50 grants, 5,000 voices)

Name of Funder: It Gets Better nonprofit Contact Person: 50Grants@itgetsbetter.org

Amount to be Requested: \$10,000 Funder's Submission Due Date: April 15th, 2024

Project Focus: helping to create an inclusive environment for all students - ^{specifically vulnerable} ~~at-risk~~ populations through advocacy groups, mentor programs, inclusivity clubs, relationship building, etc.
How awarded amount received? Full amount up front Reimbursement

Are any follow up reports required? Yes No If yes, when are they due? 3 quarterly reports + 1 final report

Is any District funding, resource, or in-kind commitment required now or in the future? Yes No

If yes, please list by dollar amount and/or in-kind service/support. Please be specific.

- Please note:
- o Each school/individual will be responsible for submitting and following through on the grant application process unless other arrangements have been made.
 - o A copy of the completed grant application must be available upon request.
 - o The person or group applying will need to submit the following documentation to the business offices:
 - o If and when the grant is awarded, a copy of the award letter.
 - o If any follow-up reports are required, a copy of the report.

A copy of this request with signatures will be returned to the contact person above when the application is reviewed, allowing the application to proceed.

Signature: Sandra Willemson Date: 3/18/2024
Building/Department Administrator

Signature: Linda J Pietz Date: 3/18/2024
Linda J Pietz, Director of Curriculum, Instruction & Assessment

Signature: Kelly Christopherson Date: 3-20-2024
Kelly Christopherson, Business Manager

Presented to School Board: _____

**CORE Educational Cooperative
PO Box 518
Platte, SD 57369
#CORE2025-001**

This Agreement is between **CORE Educational Cooperative** and the **Huron School District** in regards to speech therapy services.

Dates for Services will be August 1, 2024 through June 30, 2025.

- A. The CORE Educational Cooperative's Federal Identification Number is #81-4455958.
- B. CORE agrees to provide Speech and Language services to the Huron School District when school is in regular session at the rate of \$480.00 per day and mileage reimbursement at the state rate. If services are provided by an SLPA, the daily rate will be \$250.00 per day and mileage reimbursement at the state rate. If services are provided through teletherapy, an hourly rate of \$60.00 will be charged.

Huron School District will make payments upon completion of services and receipt of invoice from the CORE Educational Cooperative.

1. Amendment Provision:

This contract contains the entire agreement between the parties and may be amended only in writing signed by both parties.

In witness hereto the parties signify their agreement by signature affixed below:

Printed Name

Printed Name

Signature
CORE Educational Cooperative
612 S. Main Street
PO Box 518
Platte, SD 57369

Signature
Huron School District
PO Box 949
Huron, SD 57350

Mar. 14, 2024

To Whom It May Concern,

The James River Oddfellow Lodge #32 would like to host a Cemetery Tour on Sunday June 9th. We were wondering if we could rent one of the school's buses and a driver for the event. The tour would start at 2:00 and end by about 3:00. The bus would need to pick up guests at the Odd Fellow Lodge at 909 21st SE and drive across the street into Riverside Cemetery. We will have guest speakers at grave sites and the bus would stop at each of the sites. The guests would NOT be getting on and off the bus; they would stay seated in the bus and the presenter would be getting on the bus to speak at each stop. Once the tour is completed the bus then returns across the street and drops the guests off.

Please let us know if you have any questions and if this opportunity would be possible.

Thank you for your consideration,

A handwritten signature in black ink, appearing to read 'LEC' or similar initials, written in a cursive style.

Larry E. Cross
Riverside Sexton

Classified Employee of the Month

Name Rollie Hotchkin

Position Substitute Bus Driver

Date March 13, 2024

Rollie has been with us as a substitute bus driver just since October of 2023, however, you would not know that it has only been five months by looking at his work performance. He fits in with this department and our team like a custom made glove.

Rollie always has a smile on his face and a positive attitude that matches that smile. He accepts all assignments that are sent his way without hesitation. And there have been a lot of those days that we have needed Rollie to drive since he has been with us. In one week's time we needed 40 subs to cover all of the AM & PM bus runs. We couldn't have gotten through the week without Rollie being as flexible as he is about scheduling him driving assignments. I appreciate how willing he is to make an assignment work, even if he hasn't had the chance to ride along on a route prior to having to drive it. Rollie just figures things out!

Rollie takes care of each bus load of students like they are his own. In the short period of time that he has been with us he truly gets that our business is all about the kids and the safety of those kids. He doesn't care if a task may inconvenience him in some way. Rollie's attitude is as long as it is what is best for the students. He is an unfailing professional.

Being a substitute driver Rollie doesn't have his own bus, but you would never know it. He takes pride in our fleet and he will take the time to sweep out the bus, fill it with fuel, and empty the garbage of any bus that he drives. It's tough at times to get a regular driver that drives that bus every day to do those things on a consistent basis let alone a sub driver.

Rollie is one in a million and I am so thankful that he came to us wanting to join our team!



Kathie Bostrom

Director of Transportation



Huron School District #2-2

Policies and Regulations

Code:
GCBDD – Military Leave

Employees of the District who qualify under the Uniform Employment and Reemployment Rights Act (USERRA) shall receive all leave, benefits and protections afforded by that Act. Employees requesting military leave will provide notice and documentation to the District as required by USERRA. An employee shall be granted military leave for service in the uniformed services of the United States, upon receipt of the required notice. Benefits shall be maintained for these employees as required by law and any applicable collective bargaining agreement. A service member who returns to the District for work following a period of active military duty must be reinstated to the same or similar position and at the same rate of pay unless otherwise provided by law. Reemployment of a person is excused if an employer's circumstances have changed so that reemployment of the person would be impossible or unreasonable. A reduction-in-force that would have included the person would be an example.

USERRA requires that service members provide advance written or verbal notice to their employers for all military duty unless giving notice is impossible, unreasonable, or precluded by military necessity. An employee should provide notice as far in advance as is reasonable under the circumstances. All requests for military leave will be submitted to the Superintendent or Superintendent's designee accompanied by copies of the proper documentation showing the necessity for the military leave request.

To qualify for USERRA's protections, a service member must be available to return to work within certain time limits. These time limits for returning to work depend (with the exception of fitness-for-service examinations) on the duration of a person's military service.

1. If the length of service was 30 days or less, the person must report to the District by the beginning of the first regularly scheduled work period that begins on the next calendar day following completion of service, after allowance for safe travel home from the military duty location and an 8-hour rest period.
2. If the length of service was 31 days to 180 days, an application for reemployment must be submitted to the employer no later than 14 days after completion of a person's service. If submission of a timely application is impossible or unreasonable through no fault of the person, the application must be submitted as soon as possible on the next day when submitting the application becomes possible.
3. If the length of service was 180 days or more, an application for reemployment must be submitted to the employer no later than 90 days after completion of a person's military service.
4. Disability-related service: The reporting or application deadlines are extended for up to two years for persons who are hospitalized or convalescing because of an injury or illness incurred or aggravated during the performance of military service. The two-year period will be extended by the minimum time required to accommodate a circumstance beyond an individual's control that would make reporting within the two-year period impossible or unreasonable.
5. Unexcused Delay: A person's reemployment rights are not automatically forfeited if the person fails to report to work or to apply for reemployment within the required time limits. In such cases, the person will be subject to the employer's established rules governing unexcused absences.



Huron School District #2-2

Policies and Regulations

Code:
GCBDD – Military Leave

Individuals performing military duty of more than 30 days may elect to continue employer sponsored health care for up to 24 months; however, the individual is required to pay 102 percent of the full premium. For military service of less than 31 days, health care coverage is provided as if the service member had remained employed. South Dakota Retirement System shall be done pursuant to USERRA and SDRS requirements.

Military leave shall be leave without pay.



AIA® Document A133® – 2019

Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee with a Guaranteed Maximum Price

AGREEMENT made as of the 15th day of March in the year 2024
(In words, indicate day, month, and year.)

BETWEEN the Owner:
(Name, legal status, address, and other information)

Huron School District 2-2
150th 5th St. SW
P.O Box 949
Huron, SD 57350

and the Construction Manager:
(Name, legal status, address, and other information)

Puetz Design + Build
P.O. Box 968
800 N. Kimball
Mitchell, SD 57301

for the following Project:
(Name, location, and detailed description)

High School Addition and Remodel Project
801 18th St. SW
Huron, SD 57350

The Architect:
(Name, legal status, address, and other information)

JLG Architects
232 S. Main Ave.
Sioux Falls, SD 57104

The Owner and Construction Manager agree as follows.

ADDITIONS AND DELETIONS:

The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed. A vertical line in the left margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

AIA Document A201™–2017, General Conditions of the Contract for Construction, is adopted in this document by reference. Do not use with other general conditions unless this document is modified.

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ARTICLE 1 INITIAL INFORMATION

§ 1.1 This Agreement is based on the Initial Information set forth in this Section 1.1.

(For each item in this section, insert the information or a statement such as "not applicable" or "unknown at time of execution.")

§ 1.1.1 The Owner's program for the Project, as described in Section 4.1.1:

(Insert the Owner's program, identify documentation that establishes the Owner's program, or state the manner in which the program will be developed.)

High School Addition and Remodel Project

§ 1.1.2 The Project's physical characteristics:

(Identify or describe pertinent information about the Project's physical characteristics, such as size; location; dimensions; geotechnical reports; site boundaries; topographic surveys; traffic and utility studies; availability of public and private utilities and services; legal description of the site, etc.)

The addition will occur to the existing high school in Huron, SD..

§ 1.1.3 The Owner's budget for the Guaranteed Maximum Price, as defined in Article 6:

(Provide total and, if known, a line item breakdown.)

§ 1.1.4 The Owner's anticipated design and construction milestone dates:

.1 Design phase milestone dates, if any:

TBD

.2 Construction commencement date:

TBD

.3 Substantial Completion date or dates:

TBD.

.4 Other milestone dates:

N.A

§ 1.1.5 The Owner's requirements for accelerated or fast-track scheduling, or phased construction, are set forth below:
(Identify any requirements for fast-track scheduling or phased construction.)

N.A.

§ 1.1.6 The Owner's anticipated Sustainable Objective for the Project:
(Identify and describe the Owner's Sustainable Objective for the Project, if any.)

N/A

§ 1.1.6.1 If the Owner identifies a Sustainable Objective, the Owner and Construction Manager shall complete and incorporate AIA Document E234™-2019, Sustainable Projects Exhibit, Construction Manager as Constructor Edition, into this Agreement to define the terms, conditions and services related to the Owner's Sustainable Objective. If E234-2019 is incorporated into this agreement, the Owner and Construction Manager shall incorporate the completed E234-2019 into the agreements with the consultants and contractors performing services or Work in any way associated with the Sustainable Objective.

§ 1.1.7 Other Project information:
(Identify special characteristics or needs of the Project not provided elsewhere.)

N/A

§ 1.1.8 The Owner identifies the following representative in accordance with Section 4.2:
(List name, address, and other contact information.)

Mr. Kelly Christopherson
Business Manager
Huron School District 2-2
150th St. SW
P.O. Box 959
Huron, SD 57350

§ 1.1.9 The persons or entities, in addition to the Owner's representative, who are required to review the Construction Manager's submittals to the Owner are as follows:
(List name, address and other contact information.)

N/A

§ 1.1.10 The Owner shall retain the following consultants and contractors:
(List name, legal status, address, and other contact information.)

.1 Geotechnical Engineer:

TBD

.2 Civil Engineer:

TBD

.3 Other, if any:

(List any other consultants retained by the Owner, such as a Project or Program Manager.)

N.A.

§ 1.1.11 The Architect's representative:
(List name, address, and other contact information.)

Mr. Herm Harms, AIA
JLG Architects
232 S. Main Ave
Sioux Falls, SD 57104

§ 1.1.12 The Construction Manager identifies the following representative in accordance with Article 3:
(List name, address, and other contact information.)

Jim Weber, Project Executive, weberj@puetzdesignbuild.com
Elliott Coughlin, Project Manager; coughline@puetzdesignbuild.com
P.O. Box 968
800 N. Kimball
Mitchell, SD 57301
605-996-2276

§ 1.1.13 The Owner's requirements for the Construction Manager's staffing plan for Preconstruction Services, as required under Section 3.1.9:
(List any Owner-specific requirements to be included in the staffing plan.)

N/A

§ 1.1.14 The Owner's requirements for subcontractor procurement for the performance of the Work:
(List any Owner-specific requirements for subcontractor procurement.)

Public Bid Process

§ 1.1.15 Other Initial Information on which this Agreement is based:

§ 1.2 The Owner and Construction Manager may rely on the Initial Information. Both parties, however, recognize that such information may materially change and, in that event, the Owner and the Construction Manager shall appropriately adjust the Project schedule, the Construction Manager's services, and the Construction Manager's compensation. The Owner shall adjust the Owner's budget for the Guaranteed Maximum Price and the Owner's anticipated design and construction milestones, as necessary, to accommodate material changes in the Initial Information.

§ 1.3 Neither the Owner's nor the Construction Manager's representative shall be changed without ten days' prior notice to the other party.

ARTICLE 2 GENERAL PROVISIONS

§ 2.1 The Contract Documents

The Contract Documents consist of this Agreement, Conditions of the Contract (General, Supplementary and other Conditions), Drawings, Specifications, Addenda issued prior to execution of this Agreement, other documents listed in this Agreement, and Modifications issued after execution of this Agreement, all of which form the Contract and are as fully a part of the Contract as if attached to this Agreement or repeated herein. Upon the Owner's acceptance of the Construction Manager's Guaranteed Maximum Price proposal, the Contract Documents will also include the documents described in Section 3.2.3 and identified in the Guaranteed Maximum Price Amendment and revisions prepared by the Architect and furnished by the Owner as described in Section 3.2.8. The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations or agreements, either written or oral. If anything in the other Contract Documents, other than a Modification, is inconsistent with this Agreement, this Agreement shall govern. An enumeration of the Contract Documents, other than a Modification, appears in Article 15.

§ 2.2 Relationship of the Parties

The Construction Manager accepts the relationship of trust and confidence established by this Agreement and covenants with the Owner to cooperate with the Architect and exercise the Construction Manager's skill and judgment in furthering the interests of the Owner to furnish efficient construction administration, management services, and supervision; to furnish at all times an adequate supply of workers and materials; and to perform the Work in an expeditious and economical manner consistent with the Owner's interests. The Owner agrees to furnish or approve, in a timely manner, information required by the Construction Manager and to make payments to the Construction Manager in accordance with the requirements of the Contract Documents.

§ 2.3 General Conditions

§ 2.3.1 For the Preconstruction Phase, AIA Document A201™-2017, General Conditions of the Contract for Construction, as modified, shall be set forth in A201-2017, which document is incorporated herein by reference. The term "Contractor" as used in A201-2017 shall mean the Construction Manager.

§ 2.3.2 For the Construction Phase, the general conditions of the contract shall be as set forth in A201-2017, which document is incorporated herein by reference. The term "Contractor" as used in A201-2017 shall mean the Construction Manager.

ARTICLE 3 CONSTRUCTION MANAGER'S RESPONSIBILITIES

The Construction Manager's Preconstruction Phase responsibilities are set forth in Sections 3.1 and 3.2, and in the applicable provisions of A201-2017 referenced in Section 2.3.1. The Construction Manager's Construction Phase responsibilities are set forth in Section 3.3. The Owner and Construction Manager may agree, in consultation with the Architect, for the Construction Phase to commence prior to completion of the Preconstruction Phase, in which case, both phases will proceed concurrently. The Construction Manager's representative authorized to act on behalf of the Construction Manager with respect to the Project is as set forth in Section 1.1.12.

§ 3.1 Preconstruction Phase

§ 3.1.1 Extent of Responsibility

The Construction Manager shall exercise reasonable care in performing its Preconstruction Services. The Owner and Architect shall be entitled to rely on, and shall not be responsible for, the accuracy, completeness, and timeliness of services and information furnished by the Construction Manager. The Construction Manager, however, does not warrant or guarantee estimates and schedules except as may be included as part of the Guaranteed Maximum Price. The Construction Manager is not required to ascertain that the Drawings and Specifications are in accordance with applicable

laws, statutes, ordinances, codes, rules and regulations, or lawful orders of public authorities, but the Construction Manager shall promptly report to the Architect and Owner any nonconformity discovered by or made known to the Construction Manager as a request for information in such form as the Architect may require. The ultimate responsibility for the performance requirements inherent in the design will remain with the Architect. The Construction manager is not required to ascertain that the Drawings and Specifications are in accordance with applicable laws, statues, ordinances, codes, rules and regulations, or lawful orders of public authorities, but the Construction Manager shall promptly report to the Architect and Owner any nonconformity discovered by or made known to the Construction Manager as a request for information in such form as the Architect may require.

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

§ 3.1.3 Consultation

§ 3.1.3.1 The Construction Manager shall schedule and conduct meetings with the Architect and Owner to discuss such matters as procedures, progress, coordination, and scheduling of the Work.

§ 3.1.3.2 The Construction Manager shall advise the Owner and Architect on proposed site use and improvements, selection of materials, building systems, and equipment. The Construction Manager shall also provide recommendations to the Owner and Architect, consistent with the Project requirements, on constructability; availability of materials and labor; time requirements for procurement, installation and construction; prefabrication; 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. The Construction Manager shall consult with the Architect regarding professional services to be provided by the Construction Manager during the Construction Phase.

§ 3.1.3.3 The Construction Manager shall assist the Owner and Architect in establishing building information modeling and digital data protocols for the Project, using AIA Document E203™-2013, Building Information Modeling and Digital Data Exhibit, to establish the protocols for the development, use, transmission, and exchange of digital data. To the extent the Construction Manager is to provide any assistance with building information modeling, Construction Manager's obligations and assistance are limited to constructability, budgeting and scheduling, and Construction Manager disclaims any liability for professional or design services related to building information modeling.

§ 3.1.4 Project Schedule

When Project requirements in Section 4.1.1 have been sufficiently identified, the Construction Manager shall prepare and periodically update a Project schedule for the Architect's review and the Owner's acceptance. The Construction Manager shall obtain the Architect's approval for the portion of the Project schedule relating to the performance of the Architect's services. The Project schedule shall coordinate and integrate the Construction Manager's services, the Architect's services, other Owner consultants' services, and the Owner's responsibilities; and identify items that affect the Project's timely completion. The updated Project schedule shall include the following: submission of the Guaranteed Maximum Price proposal; components of the Work; times of commencement and completion required of each Subcontractor; ordering and delivery of products, including those that must be ordered in advance of construction; and the occupancy requirements of the Owner.

§ 3.1.5 Phased Construction

The Construction Manager, in consultation with the Architect, shall provide recommendations with regard to accelerated or fast-track scheduling, procurement, and sequencing for phased construction. The Construction Manager shall take into consideration cost reductions, cost information, constructability, provisions for temporary facilities, and procurement and construction scheduling issues.

§ 3.1.6 Cost Estimates

§ 3.1.6.1 Based on the preliminary design and other design criteria prepared by the Architect, the Construction Manager shall prepare, for the Architect's review and the Owner's approval, preliminary estimates of the Cost of the Work or the cost of program requirements using area, volume, or similar conceptual estimating techniques. If the Architect or Construction Manager suggests alternative materials and systems, the Construction Manager shall provide cost evaluations of those alternative materials and systems. The preliminary cost estimate will include other soft costs identified by Owner to allow for a proper understanding of the Owner's total Project cost and budget.

§ 3.1.6.2 As the Architect progresses with the preparation of the Schematic Design, Design Development and Construction Documents, the Construction Manager shall prepare and update, at intervals set forth below, Construction Manager and Architect, an estimate of the Cost of the Work with increasing detail and refinement. The Construction Manager shall include in the estimate those costs to allow for the further development of the design, price escalation, and market conditions, until such time as the Owner and Construction Manager agree on a Guaranteed Maximum Price for the Work. The estimate shall be provided for the Architect's review and the Owner's approval. The Construction Manager shall inform the Owner and Architect in the event that the estimate of the Cost of the Work exceeds the latest approved Project budget, and make recommendations for corrective action. The Construction Manager will provide the following cost management services:

§ 3.1.6.2.1 The Schematic Design Documents will be prepared by Architect in consultation with Construction Manager and the Owner based upon the collective backgrounds and experiences of Architect and Construction Manager related to projects of this type, nature and size and upon interviews with and/or information received from appropriate representatives of Owner. Construction Manager will work with Architect so Construction Manager may inform the Owner the Schematic Design Documents appear to be or not be consistent with Owner's approved budget and schedule. The Schematic Design Documents, once agreed upon by Owner, Architect and Construction Manager, will replace the Owner's program. Construction Manager will keep all members of its team and Subcontractors apprised of the preliminary design requirements, schedule times and budget constraints, so as to maintain conformance with Project schedule and budget. Any assistance provided by the Construction Manager related to the design documents will be limited to constructability, budgeting, and scheduling. Construction Manager disclaims any liability for professional or design services. Moreover, Construction Manager takes no responsibility for the accuracy or completeness of any design documents.

§ 3.1.6.2.2 Upon the Owner's approval of the Schematic Design Documents, the Architect will proceed by preparing the 100% Design Development Documents. The 100% Design Development Documents will be prepared by the Architect in consultation with the Construction Manager and the Owner based upon the collective backgrounds and experiences of the Architect and the Construction Manager related to projects of this type, nature and size upon interviews with and/or information received from appropriate representatives of the Owner. The Construction Manager will work with the Architect so the Construction Manager may inform the Owner the 100% Design Development Documents appear to be or not be consistent with the Owner's approved budget and schedule. The 100% Design Development Documents, once agreed upon by the Owner, the Architect and the Construction Manager, will replace the Schematic Design Documents. When the Architect submits the 100% Design Development Documents, the Architect will identify in writing for the Owner's and Construction Manager's approval all material changes and deviations from the 100% Schematic Design Documents and the schedule. The Construction Manager will keep all members of its team and Subcontractors apprised of the detailed design requirements, schedule timelines, and budget constraints, so as to maintain conformance with the 100% Design Development Documents, schedule and budget. Any assistance provided by the Construction Manager related to the design documents will be limited to constructability, budgeting, and scheduling. Construction Manager disclaims any liability for professional or design services. Moreover, Construction Manager takes no responsibility for the accuracy or completeness of any design documents.

§ 3.1.6.2.3 Upon the Owner's approval of the 100% Design Development Documents, the Architect will proceed by preparing the 100% Construction Documents. The 100% Construction Documents will be prepared by the Architect in consultation with the Construction Manager and the Owner based upon the collective backgrounds and experiences of the Architect and the Construction Manager related to projects of this type, nature and size, and upon interviews with and/or information received from appropriate representatives of the Owner. The Construction Manager will work with the Architect so the Construction Manager may inform the Owner the 100% Construction Documents appear to be or not be consistent with the Owner's approved budget and schedule. The 100% Construction Documents, once agreed upon by the Owner, the Architect and the Construction manager, will replace the 100% Design Development Documents. When the Architect submits the 100% Construction Documents, the Architect will identify in writing for the Owner's and the Construction Manager's approval all material changes and deviations from 100% Design Development Documents, and the schedule. The Construction Manager will keep all members of its team and Subcontractors apprised of the detailed design requirements, schedule timelines, and budget constraints, so as to maintain conformance with the 100% Construction Documents, schedule and budget. Any assistance provided by the Construction Manager related to the design documents will be limited to constructability, budgeting, and scheduling. Construction Manager disclaims any liability for professional or design services. Moreover, Construction Manager takes no responsibility for the accuracy or completeness of any design documents.

§ 3.1.6.3 If the Architect is providing cost estimating services as a Supplemental Service, and a discrepancy exists between the Construction Manager's cost estimates and the Architect's cost estimates, the Construction Manager and the Architect shall work together to reconcile the cost estimates.

§ 3.1.7 As the Architect progresses with the preparation of the Schematic Design, Design Development and Construction Documents, the Construction Manager shall consult with the Owner and Architect and make recommendations regarding constructability and schedules, for the Architect's review and the Owner's approval.

§ 3.1.8 The Construction Manager shall provide recommendations and information to the Owner and Architect regarding equipment, materials, services, and temporary Project facilities.

§ 3.1.9 The Construction Manager shall provide a staffing plan for Preconstruction Phase services for the Owner's review and approval.

§ 3.1.10 If the Owner identified a Sustainable Objective in Article 1, the Construction Manager shall fulfill its Preconstruction Phase responsibilities as required in AIA Document E234™-2019, Sustainable Projects Exhibit, Construction Manager as Constructor Edition, attached to this Agreement.

§ 3.1.11 Subcontractors and Suppliers

§ 3.1.11.1 If the Owner has provided requirements for subcontractor procurement in section 1.1.14, the Construction Manager shall provide a subcontracting plan, addressing the Owner's requirements, for the Owner's review and approval.

§ 3.1.11.2 The Construction Manager shall develop bidders' interest in the Project.

§ 3.1.11.3 The processes described in Article 9 shall apply if bid packages will be issued during the Preconstruction Phase.

§ 3.1.11.4 The Construction Manager shall not self-perform any portion of the Work without the Owner's prior written approval. If the Construction Manager desires to self-perform any portion of the Work, the Construction Manager shall notify the Owner in writing of the Construction Manager's desire to self-perform any portion of the Work prior to the commencement of such Work. In addition, if the Construction Manager desires to self-perform portions of the Work, the Construction Manager must follow the applicable competitive bid requirements of SDCL Chap. 5-18B with respect to those portions of the Work.

§ 3.1.12 Procurement

The Construction Manager shall prepare, for the Architect's review and the Owner's acceptance, a procurement schedule for items that must be ordered in advance of construction. The Construction Manager shall expedite and coordinate the ordering and delivery of materials that must be ordered in advance of construction. If the Owner agrees to procure any items prior to the establishment of the Guaranteed Maximum Price, the Owner shall procure the items on terms and conditions acceptable to the Construction Manager. Upon the establishment of the Guaranteed Maximum Price, the Owner shall assign all contracts for these items to the Construction Manager and the Construction Manager shall thereafter accept responsibility for them.

§ 3.1.13 Compliance with Laws

The Construction Manager shall comply with applicable laws, statutes, ordinances, codes, rules and regulations, and lawful orders of public authorities applicable to its performance under this Contract, and with equal employment opportunity programs, and other programs as may be required by governmental and quasi-governmental authorities.

§ 3.1.14 Other Preconstruction Services

Insert a description of any other Preconstruction Phase services to be provided by the Construction Manager, or reference an exhibit attached to this document

(Describe any other Preconstruction Phase services, such as providing cash flow projections, development of a project information management system, early selection or procurement of subcontractors, etc.)

§ 3.2 Guaranteed Maximum Price Proposal

§ 3.2.1 At a time to be mutually agreed upon by the Owner and the Construction Manager, the Construction Manager shall prepare a Guaranteed Maximum Price proposal for the Owner's and Architect's review, and the Owner's acceptance. The Guaranteed Maximum Price in the proposal shall be the sum of the Construction Manager's estimate of the Cost of the Work, the Construction Manager's contingency described in Section 3.2.4, and the Construction Manager's Fee described in Section 6.1.2.

§ 3.2.2 To the extent that the Contract Documents are anticipated to require further development, the Guaranteed Maximum Price includes the costs attributable to such further development consistent with the Contract Documents and reasonably inferable therefrom. Such further development does not include changes in scope, systems, kinds and quality of materials, finishes, or equipment, all of which, if required, shall be incorporated by Change Order.

§ 3.2.3 The Construction Manager shall include with the Guaranteed Maximum Price proposal a written statement of its basis, which shall include the following:

- .1 A list of the Drawings and Specifications, including all Addenda thereto, and the Conditions of the Contract;
- .2 A list of the clarifications and assumptions made by the Construction Manager in the preparation of the Guaranteed Maximum Price proposal, including assumptions under Section 3.2.2;
- .3 A statement of the proposed Guaranteed Maximum Price, including a statement of the estimated Cost of the Work organized by trade categories or systems, including allowances; the Construction Manager's contingency set forth in Section 3.2.4; and the Construction Manager's Fee;
- .4 The anticipated date of Substantial Completion upon which the proposed Guaranteed Maximum Price is based; and
- .5 A date by which the Owner must accept the Guaranteed Maximum Price.

§ 3.2.4 In preparing the Construction Manager's Guaranteed Maximum Price proposal, the Construction Manager shall include a contingency for the Construction Manager's exclusive use to cover those costs that are included in the Guaranteed Maximum Price but not otherwise allocated to another line item or included in a Change Order. The Construction Manager's contingency will be agreed upon by the parties as part of the Guaranteed Maximum Price. The Construction Manager's contingency is separate from the Owner's contingency. The Owner and Construction Manager acknowledge the cost estimating process is not exact, and therefore, the Construction Manager's contingency is included to adjust the estimate for quantity and price estimate inaccuracies, and other eventualities which have not been taken into precise account in the establishment of the Guaranteed Maximum Price, including, but not limited to (a) unfavorable bidding from trade contractors due to market conditions, price increases, lack of competition, supply chain issues, and other variables; (b) default in payment or performance by a Subcontractor or supplier not reimbursed by the Subcontractor's payment and performance bond, if any; (c) costs of corrective work not the responsibility of the Construction Manager or its Subcontractors and suppliers of every tier; (d) unsuitable soil conditions; and (e) other conditions which result in an increase in the Cost of the Work without increasing the Guaranteed Maximum Price.

§ 3.2.5 The Construction Manager shall meet with the Owner and Architect to review the Guaranteed Maximum Price proposal. In the event that the Owner or Architect discover any inconsistencies or inaccuracies in the information presented, they shall promptly notify the Construction Manager, who shall make appropriate adjustments to the Guaranteed Maximum Price proposal, its basis, or both.

§ 3.2.6 If the Owner notifies the Construction Manager that the Owner has accepted the Guaranteed Maximum Price proposal in writing before the date specified in the Guaranteed Maximum Price proposal, the Guaranteed Maximum Price proposal shall be deemed effective without further acceptance from the Construction Manager. Following acceptance of a Guaranteed Maximum Price, the Owner and Construction Manager shall execute the Guaranteed Maximum Price Amendment amending this Agreement, a copy of which the Owner shall provide to the Architect. The Guaranteed Maximum Price Amendment shall set forth the agreed upon Guaranteed Maximum Price with the information and assumptions upon which it is based.

§ 3.2.7 The Construction Manager shall not incur any cost to be reimbursed as part of the Cost of the Work prior to the execution of the Guaranteed Maximum Price Amendment, unless the Owner provides prior written authorization for such costs.

Init.

§ 3.2.8 The Owner shall authorize preparation of revisions to the Contract Documents that incorporate the agreed-upon assumptions and clarifications contained in the Guaranteed Maximum Price Amendment. The Owner shall promptly furnish such revised Contract Documents to the Construction Manager. The Construction Manager shall notify the Owner and Architect of any inconsistencies between the agreed-upon assumptions and clarifications contained in the Guaranteed Maximum Price Amendment and the revised Contract Documents.

§ 3.2.9 The Construction Manager shall include in the Guaranteed Maximum Price all excise, sales, consumer, use and similar taxes for the Work provided by the Construction Manager that are legally enacted, whether or not yet effective, at the time the Guaranteed Maximum Price Amendment is executed.

§ 3.3 Construction Phase

§ 3.3.1 General

§ 3.3.1.1 For purposes of Section 8.1.2 of A201–2017, the date of commencement of the Work shall mean the date of commencement of the Construction Phase.

§ 3.3.1.2 The Construction Phase shall commence upon the Owner's execution of the Guaranteed Maximum Price Amendment or, prior to acceptance of the Guaranteed Maximum Price proposal, by written agreement of the parties. The written agreement shall set forth a description of the Work to be performed by the Construction Manager, and any insurance and bond requirements for Work performed prior to execution of the Guaranteed Maximum Price Amendment.

§ 3.3.2 Administration

§ 3.3.2.1 The Construction Manager shall schedule and conduct meetings to discuss such matters as procedures, progress, coordination, scheduling, and status of the Work. The Construction Manager shall prepare and promptly distribute minutes of the meetings to the Owner and Architect.

§ 3.3.2.2 Upon the execution of the Guaranteed Maximum Price Amendment, the Construction Manager shall prepare and submit to the Owner and Architect a construction schedule for the Work and a submittal schedule in accordance with Section 3.10 of A201–2017.

§ 3.3.2.3 Monthly Report

The Construction Manager shall record the progress of the Project. On a monthly basis, or otherwise as agreed to by the Owner, the Construction Manager shall submit written progress reports to the Owner and Architect, showing percentages of completion and other information required by the Owner.

§ 3.3.2.4 Daily Logs

The Construction Manager shall keep, and make available to the Owner and Architect, a daily log containing a record for each day of weather, portions of the Work in progress, number of workers on site, identification of equipment on site, problems that might affect progress of the work, accidents, injuries, and other information required by the Owner.

§ 3.3.2.5 Cost Control

The Construction Manager shall develop a system of cost control for the Work, including regular monitoring of actual costs for activities in progress and estimates for uncompleted tasks and proposed changes. The Construction Manager shall identify variances between actual and estimated costs and report the variances to the Owner and Architect, and shall provide this information in its monthly reports to the Owner and Architect, in accordance with Section 3.3.2.3 above.

ARTICLE 4 OWNER'S RESPONSIBILITIES

§ 4.1 Information and Services Required of the Owner

§ 4.1.1 The Owner shall provide information with reasonable promptness, regarding requirements for and limitations on the Project, including a written program which shall set forth the Owner's objectives, constraints, and criteria, including schedule, space requirements and relationships, flexibility and expandability, special equipment, systems, sustainability and site requirements.

§ 4.1.2 Prior to the execution of the Guaranteed Maximum Price Amendment, the Construction Manager may request in writing that the Owner provide reasonable evidence that the Owner has made financial arrangements to fulfill the Owner's obligations under the Contract. After execution of the Guaranteed Maximum Price Amendment, the Construction Manager may request such information as set forth in A201-2017 Section 2.2.

§ 4.1.3 The Owner shall establish and periodically update the Owner's budget for the Project, including (1) the budget for the Cost of the Work as defined in Article 7, (2) the Owner's other costs, and (3) reasonable contingencies related to all of these costs. If the Owner significantly increases or decreases the Owner's budget for the Cost of the Work, the Owner shall notify the Construction Manager and Architect. The Owner and the Architect, in consultation with the Construction Manager, shall thereafter agree to a corresponding change in the Project's scope and quality.

§ 4.1.4 **Structural and Environmental Tests, Surveys and Reports.** During the Preconstruction Phase, the Owner shall furnish the following information or services with reasonable promptness. The Owner shall also furnish any other information or services under the Owner's control and relevant to the Construction Manager's performance of the Work with reasonable promptness after receiving the Construction Manager's written request for such information or services. The Construction Manager shall be entitled to rely on the accuracy of information and services furnished by the Owner but shall exercise proper precautions relating to the safe performance of the Work.

§ 4.1.4.1 The Owner shall furnish tests, inspections, and reports, required by law and as otherwise agreed to by the parties, such as structural, mechanical, and chemical tests, tests for air and water pollution, and tests for hazardous materials.

§ 4.1.4.2 The Owner shall furnish surveys describing physical characteristics, legal limitations and utility locations for the site of the Project, and a written legal description of the site. The surveys and legal information shall include, as applicable, grades and lines of streets, alleys, pavements and adjoining property and structures; designated wetlands; adjacent drainage; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and contours of the site; locations, dimensions and other necessary data with respect to existing buildings, other improvements and trees; and information concerning available utility services and lines, both public and private, above and below grade, including inverts and depths. All the information on the survey shall be referenced to a Project benchmark.

§ 4.1.4.3 The Owner, when such services are requested, shall furnish services of geotechnical engineers, which may include test borings, test pits, determinations of soil bearing values, percolation tests, evaluations of hazardous materials, seismic evaluation, ground corrosion tests and resistivity tests, including necessary operations for anticipating subsoil conditions, with written reports and appropriate recommendations.

§ 4.1.5 During the Construction Phase, the Owner shall furnish information, services and decisions required of the Owner by the Contract Documents with reasonable promptness. The Owner shall also furnish any other information, services and decisions under the Owner's control and relevant to the Construction Manager's performance of the Work with reasonable promptness after receiving the Construction Manager's written request for such information, services, and decisions. The Owner acknowledges Construction Manager's performance of the Work is or may be dependent upon receipt of the Owner-furnished information, services, and decisions. Construction Manager will not be responsible for delays in receipt of Owner-furnished information, services, and decisions when delays are not caused by the Construction Manager. In addition, Construction Manager will be entitled to an increase in the Contract Sum and extension of the Contract Time when cost increases and delays are due to Owner's failure to timely provide information, services, and decisions.

§ 4.1.6 If the Owner identified a Sustainable Objective in Article 1, the Owner shall fulfill its responsibilities as required in AIA Document E234™-2019, Sustainable Projects Exhibit, Construction Manager as Constructor Edition, attached to this Agreement.

§ 4.1.7 All testing and independent inspection services required for completed Work will be secured and paid for by the Owner. The Construction Manager will cooperate and coordinate tests and inspections with testing and inspection services agencies.

§ 4.2 Owner's Designated Representative

The Owner shall identify a representative authorized to act on behalf of the Owner with respect to the Project. The Owner's representative shall render decisions promptly and furnish information expeditiously, so as to avoid unreasonable delay in the services or Work of the Construction Manager. Except as otherwise provided in Section 4.2.1 of A201-2017, the Architect does not have such authority. The term "Owner" means the Owner or the Owner's authorized representative.

§ 4.2.1 **Legal Requirements.** The Owner shall furnish all legal, insurance and accounting services, including auditing services, that may be reasonably necessary at any time for the Project to meet the Owner's needs and interests.

§ 4.3 Architect

The Owner shall retain an Architect to provide services, duties and responsibilities as described in AIA Document B133™-2019, Standard Form of Agreement Between Owner and Architect, Construction Manager as Constructor Edition, including any additional services requested by the Construction Manager that are necessary for the Preconstruction and Construction Phase services under this Agreement. The Owner shall provide the Construction Manager with a copy of the scope of services in the executed agreement between the Owner and the Architect, and any further modifications to the Architect’s scope of services in the agreement.

ARTICLE 5 COMPENSATION AND PAYMENTS FOR PRECONSTRUCTION PHASE SERVICES

§ 5.1 Compensation

§ 5.1.1 For the Construction Manager’s Preconstruction Phase services described in Sections 3.1 and 3.2, the Owner shall compensate the Construction Manager as follows:

(Insert amount of, or basis for, compensation and include a list of reimbursable cost items, as applicable.)

\$30,000.00

§ 5.1.2 The hourly billing rates for Preconstruction Phase services of the Construction Manager and the Construction Manager’s Consultants and Subcontractors, if any, are set forth below.

(If applicable, attach an exhibit of hourly billing rates or insert them below.)

N/A

Individual or Position

Rate

§ 5.1.2.1 Hourly billing rates for Preconstruction Phase services include all costs to be paid or incurred by the Construction Manager, as required by law or collective bargaining agreements, for taxes, insurance, contributions, assessments and benefits and, for personnel not covered by collective bargaining agreements, customary benefits such as sick leave, medical and health benefits, holidays, vacations and pensions, and shall remain unchanged unless the parties execute a Modification.

§ 5.1.3 If the Preconstruction Phase services covered by this Agreement have not been completed within () months of the date of this Agreement, through no fault of the Construction Manager, the Construction Manager’s compensation for Preconstruction Phase services shall be equitably adjusted.

§ 5.2 Payments

§ 5.2.1 Unless otherwise agreed, payments for services shall be made monthly in proportion to services performed.

§ 5.2.2 Payments are due and payable upon presentation of the Construction Manager’s invoice. Amounts unpaid thirty (30) days after the invoice date shall bear interest at the rate entered below, or in the absence thereof at the legal rate prevailing from time to time at the principal place of business of the Construction Manager.

(Insert rate of monthly or annual interest agreed upon.)

1.5 % Monthly

ARTICLE 6 COMPENSATION FOR CONSTRUCTION PHASE SERVICES

§ 6.1 Contract Sum

§ 6.1.1 The Owner shall pay the Construction Manager the Contract Sum in current funds for the Construction Manager’s performance of the Contract after execution of the Guaranteed Maximum Price Amendment. The Contract Sum is the Cost of the Work as defined in Article 7 plus the Construction Manager’s Fee.

§ 6.1.2 The Construction Manager’s Fee:

(State a lump sum, percentage of Cost of the Work or other provision for determining the Construction Manager’s Fee.)

4% of Construction Cost

§ 6.1.3 The method of adjustment of the Construction Manager's Fee for changes in the Work:

4%

§ 6.1.4 Limitations, if any, on a Subcontractor's overhead and profit for increases in the cost of its portion of the Work:

TBD

§ 6.1.5 Rental rates for Construction Manager-owned equipment shall not exceed five percent (5 %) of the standard rental rate paid at the place of the Project. AED Rates will be used for Rental rates for Construction Manager-owned equipment.

§ 6.1.6 Liquidated damages, if any:

(Insert terms and conditions for liquidated damages, if any.)

N.A.

§ 6.1.7 Other:

(Insert provisions for bonus, cost savings or other incentives, if any, that might result in a change to the Contract Sum.)

N/A

§ 6.2 Guaranteed Maximum Price

The Construction Manager guarantees that the Contract Sum shall not exceed the Guaranteed Maximum Price set forth in the Guaranteed Maximum Price Amendment, subject to additions and deductions by Change Order as provided in the Contract Documents. Costs which would cause the Guaranteed Maximum Price to be exceeded shall be paid by the Construction Manager without reimbursement by the Owner.

§ 6.3 Changes in the Work

§ 6.3.1 The Owner may, without invalidating the Contract, order changes in the Work within the general scope of the Contract consisting of additions, deletions or other revisions. The Owner shall issue such changes in writing. The Construction Manager may be entitled to an equitable adjustment in the Contract Time as a result of changes in the Work.

§ 6.3.1.1 The Architect may order minor changes in the Work as provided in Article 7 of AIA Document A201–2017, General Conditions of the Contract for Construction, as amended.

§ 6.3.2 Adjustments to the Guaranteed Maximum Price on account of changes in the Work subsequent to the execution of the Guaranteed Maximum Price Amendment may be determined by any of the methods listed in Article 7 of AIA Document A201–2017, General Conditions of the Contract for Construction, as amended.

§ 6.3.3 Adjustments to subcontracts awarded on the basis of a stipulated sum shall be determined in accordance with Article 7 of A201–2017, as amended, as they refer to "cost" and "fee," and not by Articles 6 and 7 of this Agreement. Adjustments to subcontracts awarded with the Owner's prior written consent on the basis of cost plus a fee shall be calculated in accordance with the terms of those subcontracts.

§ 6.3.4 In calculating adjustments to the Guaranteed Maximum Price, the terms "cost" and "costs" as used in Article 7 of AIA Document A201–2017, as amended, shall mean the Cost of the Work as defined in Article 7 of this Agreement and the term "fee" shall mean the Construction Manager's Fee as defined in Section 6.1.2 of this Agreement.

§ 6.3.5 If no specific provision is made in Section 6.1.3 for adjustment of the Construction Manager's Fee in the case of changes in the Work, or if the extent of such changes is such, in the aggregate, that application of the adjustment provisions of Section 6.1.3 will cause substantial inequity to the Owner or Construction Manager, the Construction Manager's Fee shall be equitably adjusted on the same basis that was used to establish the Fee for the original Work, and the Guaranteed Maximum Price shall be adjusted accordingly.

ARTICLE 7 COST OF THE WORK FOR CONSTRUCTION PHASE

§ 7.1 Costs to Be Reimbursed

§ 7.1.1 The term Cost of the Work shall mean costs necessarily incurred by the Construction Manager in the proper performance of the Work. The Cost of the Work shall include only the items set forth in Sections 7.1 through 7.7.

§ 7.1.2 Where, pursuant to the Contract Documents, any cost is subject to the Owner's prior approval, the Construction Manager shall obtain such approval in writing prior to incurring the cost.

§ 7.1.3 Costs shall be at rates not higher than the standard rates paid at the place of the Project, except with prior approval of the Owner.

§ 7.2 Labor Costs

§ 7.2.1 Wages or salaries of construction workers directly employed by the Construction Manager to perform the construction of the Work at the site or, with the Owner's prior approval, at off-site workshops.

§ 7.2.2 Wages or salaries of the Construction Manager's supervisory and administrative personnel when stationed at the site and performing Work, with the Owner's prior approval.

§ 7.2.2.1 Wages or salaries of the Construction Manager's supervisory and administrative personnel when performing Work and stationed at a location other than the site, but only for that portion of time required for the Work, and limited to the personnel and activities listed below:

(Identify the personnel, type of activity and, if applicable, any agreed upon percentage of time to be devoted to the Work.)

Included in CM fees and general conditions

§ 7.2.3 Wages and salaries of the Construction Manager's supervisory or administrative personnel engaged at factories, workshops or while traveling, in expediting the production or transportation of materials or equipment required for the Work, but only for that portion of their time required for the Work.

§ 7.2.4 Costs paid or incurred by the Construction Manager, as required by law or collective bargaining agreements, for taxes, insurance, contributions, assessments and benefits and, for personnel not covered by collective bargaining agreements, customary benefits such as sick leave, medical and health benefits, holidays, vacations and pensions, provided such costs are based on wages and salaries included in the Cost of the Work under Sections 7.2.1 through 7.2.3.

§ 7.2.5 If agreed rates for labor costs, in lieu of actual costs, are provided in this Agreement, the rates shall remain unchanged throughout the duration of this Agreement, unless the parties execute a Modification.

§ 7.3 Subcontract Costs

Payments made by the Construction Manager to Subcontractors in accordance with the requirements of the subcontracts and this Agreement.

§ 7.4 Costs of Materials and Equipment Incorporated in the Completed Construction

§ 7.4.1 Costs, including transportation and storage at the site, of materials and equipment incorporated, or to be incorporated, in the completed construction.

§ 7.4.2 Costs of materials described in the preceding Section 7.4.1 in excess of those actually installed to allow for reasonable waste and spoilage. Unused excess materials, if any, shall become the Owner's property at the completion of the Work or, at the Owner's option, shall be sold by the Construction Manager. Any amounts realized from such sales shall be credited to the Owner as a deduction from the Cost of the Work.

§ 7.5 Costs of Other Materials and Equipment, Temporary Facilities and Related Items

§ 7.5.1 Costs of transportation, storage, installation, dismantling, maintenance, and removal of materials, supplies, temporary facilities, machinery, equipment and hand tools not customarily owned by construction workers that are provided by the Construction Manager at the site and fully consumed in the performance of the Work. Costs of materials, supplies, temporary facilities, machinery, equipment, and tools, that are not fully consumed, shall be based on the cost or value of the item at the time it is first used on the Project site less the value of the item when it is no longer used at the Project site. Costs for items not fully consumed by the Construction Manager shall mean fair market value.

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§ 7.5.2 Rental charges for temporary facilities, machinery, equipment, and hand tools not customarily owned by construction workers that are provided by the Construction Manager at the site, and the costs of transportation, installation, dismantling, minor repairs, and removal of such temporary facilities, machinery, equipment, and hand tools. Rates and quantities of equipment owned by the Construction Manager, or a related party as defined in Section 7.8, shall be subject to the Owner's prior approval. The total rental cost of any such equipment may not exceed the purchase price of any comparable item.

§ 7.5.3 Costs of removal of debris from the site of the Work and its proper and legal disposal.

§ 7.5.4 Costs of the Construction Manager's site office, including general office equipment and supplies.

§ 7.5.5 Costs of materials and equipment suitably stored off the site at a mutually acceptable location, subject to the Owner's prior approval.

§ 7.6 Miscellaneous Costs

§ 7.6.1 Premiums for that portion of insurance, including the builder's risk insurance, and bonds required by the Contract Documents that can be directly attributed to this Contract.

§ 7.6.1.1 Costs for self-insurance, for either full or partial amounts of the coverages required by the Contract Documents, with the Owner's prior approval.

§ 7.6.1.2 Costs for insurance through a captive insurer owned or controlled by the Construction Manager, with the Owner's prior approval.

§ 7.6.2 Sales, use, or similar taxes, imposed by a governmental authority, that are related to the Work and for which the Construction Manager is liable.

§ 7.6.3 Fees and assessments for the building permit, and for other permits, licenses, and inspections, for which the Construction Manager is required by the Contract Documents to pay.

§ 7.6.4 Fees of laboratories for tests required by the Contract Documents; except those related to defective or nonconforming Work for which reimbursement is excluded under Article 13 of AIA Document A201–2017 or by other provisions of the Contract Documents, and which do not fall within the scope of Section 7.7.3.

§ 7.6.5 Royalties and license fees paid for the use of a particular design, process, or product, required by the Contract Documents.

§ 7.6.5.1 The cost of defending suits or claims for infringement of patent rights arising from requirements of the Contract Documents, payments made in accordance with legal judgments against the Construction Manager resulting from such suits or claims, and payments of settlements made with the Owner's consent, unless the Construction Manager had reason to believe that the required design, process, or product was an infringement of a copyright or a patent, and the Construction Manager failed to promptly furnish such information to the Architect as required by Article 3 of AIA Document A201–2017. The costs of legal defenses, judgments, and settlements shall not be included in the Cost of the Work used to calculate the Construction Manager's Fee or subject to the Guaranteed Maximum Price.

§ 7.6.6 Costs for communications services, electronic equipment, and software, directly related to the Work and located at the site, with the Owner's prior approval.

§ 7.6.7 Costs of document reproductions and delivery charges.

§ 7.6.8 Deposits lost for causes other than the Construction Manager's negligence or failure to fulfill a specific responsibility in the Contract Documents.

§ 7.6.9 Legal, mediation and arbitration costs, including attorneys' fees, other than those arising from disputes between the Owner and Construction Manager, reasonably incurred by the Construction Manager after the execution of this Agreement in the performance of the Work and with the Owner's prior approval, which shall not be unreasonably withheld.

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§ 7.6.10 Expenses incurred in accordance with the Construction Manager's standard written personnel policy for relocation and temporary living allowances of the Construction Manager's personnel required for the Work, with the Owner's prior approval.

§ 7.6.11 That portion of the reasonable expenses of the Construction Manager's supervisory or administrative personnel incurred while traveling in discharge of duties connected with the Work.

§ 7.7 Other Costs and Emergencies

§ 7.7.1 Other costs incurred in the performance of the Work, with the Owner's prior approval.

§ 7.7.2 Costs incurred in taking action to prevent threatened damage, injury, or loss, in case of an emergency affecting the safety of persons and property, as provided in Article 10 of AIA Document A201-2017.

§ 7.7.3 Costs of repairing or correcting damaged or nonconforming Work executed by the Construction Manager, Subcontractors, or suppliers, provided that such damaged or nonconforming Work was not caused by the negligence of, or failure to fulfill a specific responsibility by, the Construction Manager, and only to the extent that the cost of repair or correction is not recovered by the Construction Manager from insurance, sureties, Subcontractors, suppliers, or others.

§ 7.7.4 The costs described in Sections 7.1 through 7.7 shall be included in the Cost of the Work, notwithstanding any provision of AIA Document A201-2017 or other Conditions of the Contract which may require the Construction Manager to pay such costs, unless such costs are excluded by the provisions of Section 7.9.

§ 7.7.5 The deductible portion of any losses under policies of builder's risk insurance.

§ 7.8 Related Party Transactions

§ 7.8.1 For purposes of this Section 7.8, the term "related party" shall mean (1) a parent, subsidiary, affiliate, or other entity having common ownership of, or sharing common management with, the Construction Manager; (2) any entity in which any stockholder in, or management employee of, the Construction Manager holds an equity interest in excess of ten percent in the aggregate; (3) any entity which has the right to control the business or affairs of the Construction Manager; or (4) any person, or any member of the immediate family of any person, who has the right to control the business or affairs of the Construction Manager.

§ 7.8.2 If any of the costs to be reimbursed arise from a transaction between the Construction Manager and a related party, the Construction Manager shall notify the Owner of the specific nature of the contemplated transaction, including the identity of the related party and the anticipated cost to be incurred, before any such transaction is consummated or cost incurred. If the Owner, after such notification, authorizes the proposed transaction in writing, then the cost incurred shall be included as a cost to be reimbursed, and the Construction Manager shall procure the Work, equipment, goods, or service, from the related party, as a Subcontractor, according to the terms of Article 9. If the Owner fails to authorize the transaction in writing, the Construction Manager shall procure the Work, equipment, goods, or service from some person or entity other than a related party according to the terms of Article 9.

§ 7.9 Costs Not To Be Reimbursed

§ 7.9.1 The Cost of the Work shall not include the items listed below:

- .1 Salaries and other compensation of the Construction Manager's personnel stationed at the Construction Manager's principal office or offices other than the site office, except as specifically provided in Section 7.2, or as may be provided in Article 14;
- .2 Bonuses, profit sharing, incentive compensation, and any other discretionary payments, paid to anyone hired by the Construction Manager or paid to any Subcontractor or vendor, unless the Owner has provided prior approval;
- .3 Expenses of the Construction Manager's principal office and offices other than the site office;
- .4 Overhead and general expenses, except as may be expressly included in Sections 7.1 to 7.7;
- .5 The Construction Manager's capital expenses, including interest on the Construction Manager's capital employed for the Work;
- .6 Except as provided in Section 7.7.3 of this Agreement, costs due to the negligence of, or failure to fulfill a specific responsibility of the Contract by, the Construction Manager, Subcontractors, and suppliers, or anyone directly or indirectly employed by any of them or for whose acts any of them may be liable;

- .7 Any cost not specifically and expressly described in Sections 7.1 to 7.7;
- .8 Costs, other than costs included in Change Orders approved by the Owner, that would cause the Guaranteed Maximum Price to be exceeded; and
- .9 Costs for services incurred during the Preconstruction Phase.

ARTICLE 8 DISCOUNTS, REBATES, AND REFUNDS

§ 8.1 Cash discounts obtained on payments made by the Construction Manager shall accrue to the Owner if (1) before making the payment, the Construction Manager included the amount to be paid, less such discount, in an Application for Payment and received payment from the Owner, or (2) the Owner has deposited funds with the Construction Manager with which to make payments; otherwise, cash discounts shall accrue to the Construction Manager. Trade discounts, rebates, refunds, and amounts received from sales of surplus materials and equipment shall accrue to the Owner, and the Construction Manager shall make provisions so that they can be obtained.

§ 8.2 Amounts that accrue to the Owner in accordance with the provisions of Section 8.1 shall be credited to the Owner as a deduction from the Cost of the Work.

ARTICLE 9 SUBCONTRACTS AND OTHER AGREEMENTS

§ 9.1 Those portions of the Work that the Construction Manager does not customarily perform with the Construction Manager's own personnel shall be performed under subcontracts or other appropriate agreements with the Construction Manager. The Owner may designate specific persons from whom, or entities from which, the Construction Manager shall obtain bids. The Construction Manager shall obtain bids from Subcontractors, and from suppliers of materials or equipment fabricated especially for the Work, who are qualified to perform that portion of the Work in accordance with the requirements of the Contract Documents. The Construction Manager shall deliver such bids to the Architect and Owner with an indication as to which bids the Construction Manager intends to accept. The Owner then has the right to review the Construction Manager's list of proposed subcontractors and suppliers in consultation with the Architect and, subject to Section 9.1.1, to object to any subcontractor or supplier. Any advice of the Architect, or approval or objection by the Owner, shall not relieve the Construction Manager of its responsibility to perform the Work in accordance with the Contract Documents. The Construction Manager shall not be required to contract with anyone to whom the Construction Manager has reasonable objection.

§ 9.1.1 When a specific subcontractor or supplier (1) is recommended to the Owner by the Construction Manager; (2) is qualified to perform that portion of the Work; and (3) has submitted a bid that conforms to the requirements of the Contract Documents without reservations or exceptions, but the Owner requires that another bid be accepted, then the Construction Manager may require that a Change Order be issued to adjust the Guaranteed Maximum Price by the difference between the bid of the person or entity recommended to the Owner by the Construction Manager and the amount of the subcontract or other agreement actually signed with the person or entity designated by the Owner.

§ 9.2 Subcontracts or other agreements shall conform to the applicable payment provisions of this Agreement, and shall not be awarded on the basis of cost plus a fee without the Owner's prior written approval. If a subcontract is awarded on the basis of cost plus a fee, the Construction Manager shall provide in the subcontract for the Owner to receive the same audit rights with regard to the Subcontractor as the Owner receives with regard to the Construction Manager in Article 10.

ARTICLE 10 ACCOUNTING RECORDS

The Construction Manager shall keep full and detailed records and accounts related to the Cost of the Work, and exercise such controls, as may be necessary for proper financial management under this Contract and to substantiate all costs incurred. The accounting and control systems shall be satisfactory to the Owner. The Owner and the Owner's auditors shall, during regular business hours and upon reasonable notice, be afforded access to, and shall be permitted to audit and copy, the Construction Manager's records and accounts, including complete documentation supporting accounting entries, books, job cost reports, correspondence, instructions, drawings, receipts, subcontracts, Subcontractor's proposals, Subcontractor's invoices, purchase orders, vouchers, memoranda, and other data relating to this Contract. The Construction Manager shall preserve these records for a period of three years after final payment, or for such longer period as may be required by law.

ARTICLE 11 PAYMENTS FOR CONSTRUCTION PHASE SERVICES

§ 11.1 Progress Payments

§ 11.1.1 Based upon Applications for Payment submitted to the Architect by the Construction Manager, and Certificates for Payment issued by the Architect, the Owner shall make progress payments on account of the Contract Sum, to the Construction Manager, as provided below and elsewhere in the Contract Documents.

§ 11.1.2 The period covered by each Application for Payment shall be one calendar month ending on the last day of the month, or as follows:

One calendar month ending on the 20th of each month

§ 11.1.3 The Construction Manager will deliver to the Architect and the Owner each Application for Payment. The Architect will, within ten days after receipt of the Construction Manager's Application for Payment, either issue to the Owner a Certificate for Payment, with a copy to the Construction Manager, for such amount as the Architect determines is properly due, or notify the Construction Manager and the Owner in writing of the Architect's reasons for withholding certification in whole or in part. In this event, the Construction Manager, Architect and Owner will meet immediately and attempt to resolve the disputed amounts. If they are unable to do so, the Construction Manager may file a Claim as set forth in Article 15 of A201-2017, as amended. The Owner shall make payment of the amount certified to the Construction Manager not in dispute by electronic funds transfer within thirty (30) days of receipt of the Application for Payment by the Architect and the Owner. If an Application for Payment is received by the Architect after the application date fixed above, payment shall be made by the Owner not later than thirty (30) days after the Architect receives the Application for Payment.

(Federal, state or local laws may require payment within a certain period of time.)

§ 11.1.4 With each Application for Payment, the Construction Manager shall submit payrolls, petty cash accounts, receipted invoices or invoices with check vouchers attached, and any other evidence required by the Owner or Architect to demonstrate that payments already made by the Construction Manager on account of the Cost of the Work equal or exceed progress payments already received by the Construction Manager, plus payrolls for the period covered by the present Application for Payment, less that portion of the progress payments attributable to the Construction Manager's Fee.

§ 11.1.5 Each Application for Payment shall be based on the most recent schedule of values submitted by the Construction Manager in accordance with the Contract Documents. The schedule of values shall allocate the entire Guaranteed Maximum Price among: (1) the various portions of the Work; (2) any contingency for costs that are included in the Guaranteed Maximum Price but not otherwise allocated to another line item or included in a Change Order; and (3) the Construction Manager's Fee.

§ 11.1.5.1 The schedule of values shall be prepared in such form and supported by such data to substantiate its accuracy as the Architect may require. The schedule of values shall be used as a basis for reviewing the Construction Manager's Applications for Payment.

§ 11.1.5.2 The allocation of the Guaranteed Maximum Price under this Section 11.1.5 shall not constitute a separate guaranteed maximum price for the Cost of the Work of each individual line item in the schedule of values.

§ 11.1.5.3 When the Construction Manager allocates costs from a contingency to another line item in the schedule of values, the Construction Manager shall submit supporting documentation to the Architect.

§ 11.1.6 Applications for Payment shall show the percentage of completion of each portion of the Work as of the end of the period covered by the Application for Payment. The percentage of completion shall be the lesser of (1) the percentage of that portion of the Work which has actually been completed, or (2) the percentage obtained by dividing (a) the expense that has actually been incurred by the Construction Manager on account of that portion of the Work and for which the Construction Manager has made payment or intends to make payment prior to the next Application for Payment, by (b) the share of the Guaranteed Maximum Price allocated to that portion of the Work in the schedule of values.

§ 11.1.7 In accordance with AIA Document A201-2017 and subject to other provisions of the Contract Documents, the amount of each progress payment shall be computed as follows:

§ 11.1.7.1 The amount of each progress payment shall first include:

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- .1 That portion of the Guaranteed Maximum Price properly allocable to completed Work as determined by multiplying the percentage of completion of each portion of the Work by the share of the Guaranteed Maximum Price allocated to that portion of the Work in the most recent schedule of values;
- .2 That portion of the Guaranteed Maximum Price properly allocable to materials and equipment delivered and suitably stored at the site for subsequent incorporation in the completed construction or, if approved in writing in advance by the Owner, suitably stored off the site at a location agreed upon in writing;
- .3 That portion of Construction Change Directives that the Architect determines, in the Architect's professional judgment, to be reasonably justified; and
- .4 The Construction Manager's Fee, computed upon the Cost of the Work described in the preceding Sections 11.1.7.1.1 and 11.1.7.1.2 at the rate stated in Section 6.1.2 or, if the Construction Manager's Fee is stated as a fixed sum in that Section, an amount that bears the same ratio to that fixed-sum fee as the Cost of the Work included in Sections 11.1.7.1.1 and 11.1.7.1.2 bears to a reasonable estimate of the probable Cost of the Work upon its completion.

§ 11.1.7.2 The amount of each progress payment shall then be reduced by:

- .1 The aggregate of any amounts previously paid by the Owner;
- .2 The amount, if any, for Work that remains uncorrected and for which the Architect has previously withheld a Certificate for Payment as provided in Article 9 of AIA Document A201-2017;
- .3 Any amount for which the Construction Manager does not intend to pay a Subcontractor or material supplier, unless the Work has been performed by others the Construction Manager intends to pay;
- .4 For Work performed or defects discovered since the last payment application, any amount for which the Architect may withhold payment, or nullify a Certificate of Payment in whole or in part, as provided in Article 9 of AIA Document A201-2017;
- .5 The shortfall, if any, indicated by the Construction Manager in the documentation required by Section 11.1.4 to substantiate prior Applications for Payment, or resulting from errors subsequently discovered by the Owner's auditors in such documentation; and
- .6 Retainage withheld pursuant to Section 11.1.8.

§ 11.1.8 Retainage

§ 11.1.8.1 For each progress payment made prior to Substantial Completion of the Work, the Owner may withhold the following amount, as retainage, from the payment otherwise due:

(Insert a percentage or amount to be withheld as retainage from each Application for Payment. The amount of retainage may be limited by governing law.)

5% of the cost of the Work

§ 11.1.8.1.1 The following items are not subject to retainage:

(Insert any items not subject to the withholding of retainage, such as general conditions, insurance, etc.)

Payments made to materials suppliers

§ 11.1.8.2 Reduction or limitation of retainage, if any, shall be as follows:

(If the retainage established in Section 11.1.8.1 is to be modified prior to Substantial Completion of the entire Work, insert provisions for such modification.)

N/A

§ 11.1.8.3 Except as set forth in this Section 11.1.8.3, upon Substantial Completion of the Work, the Construction Manager may submit an Application for Payment that includes the retainage withheld from prior Applications for Payment pursuant to this Section 11.1.8. The Application for Payment submitted at Substantial Completion shall not include retainage as follows:

(Insert any other conditions for release of retainage, such as upon completion of the Owner's audit and reconciliation, upon Substantial Completion.)

N/A

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§ 11.1.9 If final completion of the Work is materially delayed through no fault of the Construction Manager, the Owner shall pay the Construction Manager any additional amounts in accordance with Article 9 of AIA Document A201–2017.

§ 11.1.10 Except with the Owner’s prior written approval, the Construction Manager shall not make advance payments to suppliers for materials or equipment which have not been delivered and suitably stored at the site.

§ 11.1.11 The Owner and the Construction Manager shall agree upon a mutually acceptable procedure for review and approval of payments to Subcontractors, and the percentage of retainage held on Subcontracts, and the Construction Manager shall execute subcontracts in accordance with those agreements.

§ 11.1.12 In taking action on the Construction Manager’s Applications for Payment the Architect shall be entitled to rely on the accuracy and completeness of the information furnished by the Construction Manager, and such action shall not be deemed to be a representation that (1) the Architect has made a detailed examination, audit, or arithmetic verification, of the documentation submitted in accordance with Section 11.1.4 or other supporting data; (2) that the Architect has made exhaustive or continuous on-site inspections; or (3) that the Architect has made examinations to ascertain how or for what purposes the Construction Manager has used amounts previously paid on account of the Contract. Such examinations, audits, and verifications, if required by the Owner, will be performed by the Owner’s auditors acting in the sole interest of the Owner.

§ 11.2 Final Payment

§ 11.2.1 Final payment, constituting the entire unpaid balance of the Contract Sum, shall be made by the Owner to the Construction Manager when

- .1 the Construction Manager has fully performed the Contract, except for the Construction Manager’s responsibility to correct Work as provided in Article 12 of AIA Document A201–2017, and to satisfy other requirements, if any, which extend beyond final payment;
- .2 the Construction Manager has submitted a final accounting for the Cost of the Work and a final Application for Payment; and
- .3 a final Certificate for Payment has been issued by the Architect in accordance with Section 11.2.2.2.

§ 11.2.2 Within 30 days of the Owner’s receipt of the Construction Manager’s final accounting for the Cost of the Work, the Owner shall conduct an audit of the Cost of the Work or notify the Architect that it will not conduct an audit.

§ 11.2.2.1 If the Owner conducts an audit of the Cost of the Work, the Owner shall, within 10 days after completion of the audit, submit a written report based upon the auditors’ findings to the Architect.

§ 11.2.2.2 Within seven days after receipt of the written report described in Section 11.2.2.1, or receipt of notice that the Owner will not conduct an audit, and provided that the other conditions of Section 11.2.1 have been met, the Architect will either issue to the Owner a final Certificate for Payment with a copy to the Construction Manager, or notify the Construction Manager and Owner in writing of the Architect’s reasons for withholding a certificate as provided in Article 9 of AIA Document A201–2017. The time periods stated in this Section 11.2.2 supersede those stated in Article 9 of AIA Document A201–2017. The Architect is not responsible for verifying the accuracy of the Construction Manager’s final accounting.

§ 11.2.2.3 If the Owner’s auditors’ report concludes that the Cost of the Work, as substantiated by the Construction Manager’s final accounting, is less than claimed by the Construction Manager, the Construction Manager shall be entitled to request mediation of the disputed amount without seeking an initial decision pursuant to Article 15 of AIA Document A201–2017. A request for mediation shall be made by the Construction Manager within 30 days after the Construction Manager’s receipt of a copy of the Architect’s final Certificate for Payment. Failure to request mediation within this 30-day period shall result in the substantiated amount reported by the Owner’s auditors becoming binding on the Construction Manager. Pending a final resolution of the disputed amount, the Owner shall pay the Construction Manager the amount certified in the Architect’s final Certificate for Payment.

§ 11.2.3 The Owner’s final payment to the Construction Manager shall be made no later than 30 days after the issuance of the Architect’s final Certificate for Payment, or as follows:

§ 11.2.4 If, subsequent to final payment, and at the Owner's request, the Construction Manager incurs costs, described in Sections 7.1 through 7.7, and not excluded by Section 7.9, to correct defective or nonconforming Work, the Owner shall reimburse the Construction Manager for such costs, and the Construction Manager's Fee applicable thereto, on the same basis as if such costs had been incurred prior to final payment, but not in excess of the Guaranteed Maximum Price. If adjustments to the Contract Sum are provided for in Section 6.1.7, the amount of those adjustments shall be recalculated, taking into account any reimbursements made pursuant to this Section 11.2.4 in determining the net amount to be paid by the Owner to the Construction Manager.

§ 11.3 Interest

Payments due and unpaid under the Contract shall bear interest from the date payment is due at the rate stated below, or in the absence thereof, at the legal rate prevailing from time to time at the place where the Project is located.

(Insert rate of interest agreed upon, if any.)

1.5 % monthly

ARTICLE 12 DISPUTE RESOLUTION

§ 12.1 Initial Decision Maker

§ 12.1.1 Intentionally Omitted

§ 12.1.2 Intentionally Omitted

(If the parties mutually agree, insert the name, address and other contact information of the Initial Decision Maker, if other than the Architect.)

The procedures outlined in Article 15 of A201-2017, as amended, will apply.

§ 12.2 Binding Dispute Resolution

For any Claim subject to, but not resolved by mediation pursuant to Article 15 of AIA Document A201-2017, the method of binding dispute resolution shall be as follows:

(Check the appropriate box.)

Arbitration pursuant to Article 15 of AIA Document A201-2017

Litigation in a court of competent jurisdiction

Other: *(Specify)*

If the Owner and Construction Manager do not select a method of binding dispute resolution, or do not subsequently agree in writing to a binding dispute resolution method other than litigation, Claims will be resolved by litigation in a court of competent jurisdiction.

ARTICLE 13 TERMINATION OR SUSPENSION

§ 13.1 Termination Prior to Execution of the Guaranteed Maximum Price Amendment

§ 13.1.1 If the Owner and the Construction Manager do not reach an agreement on the Guaranteed Maximum Price, the Owner may terminate this Agreement upon not less than seven days' written notice to the Construction Manager, and the Construction Manager may terminate this Agreement, upon not less than seven days' written notice to the Owner.

§ 13.1.2 In the event of termination of this Agreement pursuant to Section 13.1.1, the Construction Manager shall be compensated for Preconstruction Phase services and Work performed prior to receipt of a notice of termination, in accordance with the terms of this Agreement. In no event shall the Construction Manager's compensation under this Section exceed the compensation set forth in Section 5.1.

§ 13.1.3 Prior to the execution of the Guaranteed Maximum Price Amendment, the Owner may terminate this Agreement upon not less than seven days' written notice to the Construction Manager for the Owner's convenience and without cause, and the Construction Manager may terminate this Agreement, upon not less than seven days' written notice to the Owner, for the reasons set forth in Article 14 of A201–2017.

§ 13.1.4 In the event of termination of this Agreement pursuant to Section 13.1.3, the Construction Manager shall be equitably compensated for Preconstruction Phase services and Work performed prior to receipt of a notice of termination. In no event shall the Construction Manager's compensation under this Section exceed the compensation set forth in Section 5.1.

§ 13.1.5 If the Owner terminates the Contract pursuant to Section 13.1.3 after the commencement of the Construction Phase but prior to the execution of the Guaranteed Maximum Price Amendment, the Owner shall pay to the Construction Manager an amount calculated as follows, which amount shall be in addition to any compensation paid to the Construction Manager under Section 13.1.4:

- .1 Take the Cost of the Work incurred by the Construction Manager to the date of termination;
- .2 Add the Construction Manager's Fee computed upon the Cost of the Work to the date of termination at the rate stated in Section 6.1 or, if the Construction Manager's Fee is stated as a fixed sum in that Section, an amount that bears the same ratio to that fixed-sum Fee as the Cost of the Work at the time of termination bears to a reasonable estimate of the probable Cost of the Work upon its completion; and
- .3 Subtract the aggregate of previous payments made by the Owner for Construction Phase services.

§ 13.1.6 The Owner shall also pay the Construction Manager fair compensation, either by purchase or rental at the election of the Owner, for any equipment owned by the Construction Manager that the Owner elects to retain and that is not otherwise included in the Cost of the Work under Section 13.1.5.1. To the extent that the Owner elects to take legal assignment of subcontracts and purchase orders (including rental agreements), the Construction Manager shall, as a condition of receiving the payments referred to in this Article 13, execute and deliver all such papers and take all such steps, including the legal assignment of such subcontracts and other contractual rights of the Construction Manager, as the Owner may require for the purpose of fully vesting in the Owner the rights and benefits of the Construction Manager under such subcontracts or purchase orders. All Subcontracts, purchase orders and rental agreements entered into by the Construction Manager will contain provisions allowing for assignment to the Owner as described above.

§ 13.1.6.1 If the Owner accepts assignment of subcontracts, purchase orders or rental agreements as described above, the Owner will reimburse or indemnify the Construction Manager for all costs arising under the subcontract, purchase order or rental agreement, if those costs would have been reimbursable as Cost of the Work if the contract had not been terminated. If the Owner chooses not to accept assignment of any subcontract, purchase order or rental agreement that would have constituted a Cost of the Work had this agreement not been terminated, the Construction Manager will terminate the subcontract, purchase order or rental agreement and the Owner will pay the Construction Manager the costs necessarily incurred by the Construction Manager because of such termination.

§ 13.2 Termination or Suspension Following Execution of the Guaranteed Maximum Price Amendment

§ 13.2.1 Termination

The Contract may be terminated by the Owner or the Construction Manager as provided in Article 14 of AIA Document A201–2017.

§ 13.2.2 Termination by the Owner for Cause

§ 13.2.2.1 If the Owner terminates the Contract for cause as provided in Article 14 of AIA Document A201–2017, the amount, if any, to be paid to the Construction Manager under Article 14 of AIA Document A201–2017 shall not cause the Guaranteed Maximum Price to be exceeded, nor shall it exceed an amount calculated as follows:

- .1 Take the Cost of the Work incurred by the Construction Manager to the date of termination;
- .2 Add the Construction Manager's Fee, computed upon the Cost of the Work to the date of termination at the rate stated in Section 6.1 or, if the Construction Manager's Fee is stated as a fixed sum in that Section, an amount that bears the same ratio to that fixed-sum Fee as the Cost of the Work at the time of termination bears to a reasonable estimate of the probable Cost of the Work upon its completion;
- .3 Subtract the aggregate of previous payments made by the Owner; and
- .4 Subtract the costs and damages incurred, or to be incurred, by the Owner under Article 14 of AIA Document A201–2017.

§ 13.2.2.2 The Owner shall also pay the Construction Manager fair compensation, either by purchase or rental at the election of the Owner, for any equipment owned by the Construction Manager that the Owner elects to retain and that is not otherwise included in the Cost of the Work under Section 13.2.2.1.1. To the extent that the Owner elects to take legal assignment of subcontracts and purchase orders (including rental agreements), the Construction Manager shall, as a condition of receiving the payments referred to in this Article 13, execute and deliver all such papers and take all such steps, including the legal assignment of such subcontracts and other contractual rights of the Construction Manager, as the Owner may require for the purpose of fully vesting in the Owner the rights and benefits of the Construction Manager under such subcontracts or purchase orders.

§ 13.2.3 Termination by the Owner for Convenience

If the Owner terminates the Contract for convenience in accordance with Article 14 of AIA Document A201–2017, then the Owner shall pay the Construction Manager a termination fee as follows:

(Insert the amount of or method for determining the fee, if any, payable to the Construction Manager following a termination for the Owner's convenience.)

All costs incurred to date plus a \$15,000 termination fee.

§ 13.3 Suspension

The Work may be suspended by the Owner as provided in Article 14 of AIA Document A201–2017; in such case, the Guaranteed Maximum Price and Contract Time shall be increased as provided in Article 14 of AIA Document A201–2017, except that the term "profit" shall be understood to mean the Construction Manager's Fee as described in Sections 6.1 and 6.3.5 of this Agreement.

ARTICLE 14 MISCELLANEOUS PROVISIONS

§ 14.1 Terms in this Agreement shall have the same meaning as those in A201–2017. Where reference is made in this Agreement to a provision of AIA Document A201–2017 or another Contract Document, the reference refers to that provision as amended or supplemented by other provisions of the Contract Documents.

§ 14.2 Successors and Assigns

§ 14.2.1 The Owner and Construction Manager, respectively, bind themselves, their partners, successors, assigns and legal representatives to covenants, agreements, and obligations contained in the Contract Documents. Except as provided in Section 14.2.2 of this Agreement, and in Section 13.2.2 of A201–2017, neither party to the Contract shall assign the Contract as a whole without written consent of the other. If either party attempts to make an assignment without such consent, that party shall nevertheless remain legally responsible for all obligations under the Contract.

§ 14.2.2 The Owner may, without consent of the Construction Manager, assign the Contract to a lender providing construction financing for the Project, if the lender assumes the Owner's rights and obligations under the Contract Documents. The Construction Manager shall execute all consents reasonably required to facilitate the assignment.

§ 14.3 Insurance and Bonds

§ 14.3.1 Preconstruction Phase

The Construction Manager shall maintain the following insurance coverages for the duration of the Preconstruction Services performed under this Agreement, as set forth in the Exhibit B – Insurance and Bonds.

(Paragraphs deleted)

(Table deleted)

(Paragraphs deleted)

ARTICLE 15 SCOPE OF THE AGREEMENT

§ 15.1 This Agreement represents the entire and integrated agreement between the Owner and the Construction Manager and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both Owner and Construction Manager.

§ 15.2 The following documents comprise the Agreement:

- .1 AIA Document A133™–2019, Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee with a Guaranteed Maximum Price

- .2 AIA Document A133™-2019, Exhibit A, Guaranteed Maximum Price Amendment, if executed
- .3 AIA Document A133™-2019, Exhibit B, Insurance and Bonds
- .4 AIA Document A201™-2017, General Conditions of the Contract for Construction
- .5 AIA Document E203™-2013, Building Information Modeling and Digital Data Exhibit, dated as indicated below:
(Insert the date of the E203-2013 incorporated into this Agreement.)

N/A

- .6 Other Exhibits:
(Check all boxes that apply.)

AIA Document E234™-2019, Sustainable Projects Exhibit, Construction Manager as Constructor Edition, dated as indicated below:
(Insert the date of the E234-2019 incorporated into this Agreement.)

N/A

Supplementary and other Conditions of the Contract:

Document	Title	Date	Pages
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- .7 Other documents, if any, listed below:
(List here any additional documents that are intended to form part of the Contract Documents. AIA Document A201–2017 provides that the advertisement or invitation to bid, Instructions to Bidders, sample forms, the Construction Manager’s bid or proposal, portions of Addenda relating to bidding or proposal requirements, and other information furnished by the Owner in anticipation of receiving bids or proposals, are not part of the Contract Documents unless enumerated in this Agreement. Any such documents should be listed here only if intended to be part of the Contract Documents.)

This Agreement is entered into as of the day and year first written above.

OWNER (Signature)
Mr. Garrett Bischoff School Board President
(Printed name and title)



CONSTRUCTION MANAGER (Signature)
Jim Weber Project Executive/Owner
(Printed name and title)

Additions and Deletions Report for **AIA® Document A133® – 2019**

This Additions and Deletions Report, as defined on page 1 of the associated document, reproduces below all text the author has added to the standard form AIA document in order to complete it, as well as any text the author may have added to or deleted from the original AIA text. Added text is shown underlined. Deleted text is indicated with a horizontal line through the original AIA text.

Note: This Additions and Deletions Report is provided for information purposes only and is not incorporated into or constitute any part of the associated AIA document. This Additions and Deletions Report and its associated document were generated simultaneously by AIA software at 16:35:20 ET on 03/18/2024.

PAGE 1

AGREEMENT made as of the 15th day of March in the year 2024

...

Huron School District 2-2
150th 5th St. SW
P.O. Box 949
Huron, SD 57350

...

Puetz Design + Build
P.O. Box 968
800 N. Kimball
Mitchell, SD 57301

...

High School Addition and Remodel Project
801 18th St. SW
Huron, SD 57350

...

JLG Architects
232 S. Main Ave.
Sioux Falls, SD 57104

PAGE 2

High School Addition and Remodel Project

...

The addition will occur to the existing high school in Huron, SD..

PAGE 3

TBD

...

TBD

...

TBD

...

N.A.

...

N.A.

...

N/A

...

N/A

...

Mr. Kelly Christopherson
Business Manager
Huron School District 2-2
150th St. SW
P.O. Box 959
Huron, SD 57350

...

N/A
PAGE 4

TBD

...

TBD

...

N.A.

...

Mr. Herm Harms, AIA
JLG Architects
232 S. Main Ave
Sioux Falls, SD 57104

...

Jim Weber, Project Executive, weberj@puetzdesignbuild.com
Elliott Coughlin, Project Manager; coughline@puetzdesignbuild.com

P.O. Box 968
800 N. Kimball
Mitchell, SD 57301
605-996-2276

...

N/A

...

Public Bid Process
PAGE 5

§ 2.3.1 For the Preconstruction Phase, AIA Document A201™–2017, General Conditions of the Contract for Construction, ~~shall apply as follows: Section 1.5, Ownership and Use of Documents; Section 1.7, Digital Data Use and Transmission; Section 1.8, Building Information Model Use and Reliance; Section 2.2.4, Confidential Information; Section 3.12.10, Professional Services; Section 10.3, Hazardous Materials; Section 13.1, Governing Law, as modified,~~ shall be set forth in A201-2017, which document is incorporated herein by reference. The term "Contractor" as used in A201–2017 shall mean the Construction Manager.

...

The Construction Manager's Preconstruction Phase responsibilities are set forth in Sections 3.1 and 3.2, and in the applicable provisions of A201-2017 referenced in Section 2.3.1. The Construction Manager's Construction Phase responsibilities are set forth in Section 3.3. The Owner and Construction Manager may agree, in consultation with the Architect, for the Construction Phase to commence prior to completion of the Preconstruction Phase, in which case, both phases will proceed concurrently. ~~The Construction Manager shall identify a Manager's representative authorized to act on behalf of the Construction Manager with respect to the Project.~~ Project is as set forth in Section 1.1.12.

...

The Construction Manager shall exercise reasonable care in performing its Preconstruction Services. The Owner and Architect shall be entitled to rely on, and shall not be responsible for, the accuracy, completeness, and timeliness of services and information furnished by the Construction Manager. The Construction Manager, however, does not warrant or guarantee estimates and schedules except as may be included as part of the Guaranteed Maximum Price. The Construction Manager is not required to ascertain that the Drawings and Specifications are in accordance with applicable laws, statutes, ordinances, codes, rules and regulations, or lawful orders of public authorities, but the Construction Manager shall promptly report to the Architect and Owner any nonconformity discovered by or made known to the Construction Manager as a request for information in such form as the Architect may require. The ultimate responsibility for the performance requirements inherent in the design will remain with the Architect. The Construction manager is not required to ascertain that the Drawings and Specifications are in accordance with applicable laws, statues, ordinances, codes, rules and regulations, or lawful orders of public authorities, but the Construction Manager shall promptly report to the Architect and Owner any nonconformity discovered by or made known to the Construction Manager as a request for information in such form as the Architect may require.

PAGE 6

§ 3.1.3.3 The Construction Manager shall assist the Owner and Architect in establishing building information modeling and digital data protocols for the Project, using AIA Document E203™–2013, Building Information Modeling and Digital Data Exhibit, to establish the protocols for the development, use, transmission, and exchange of digital data. To the extent the Construction Manager is to provide any assistance with building information modeling, Construction Manager's obligations and assistance are limited to constructability, budgeting and scheduling, and Construction Manager disclaims any liability for professional or design services related to building information modeling.

...

§ 3.1.6.1 Based on the preliminary design and other design criteria prepared by the Architect, the Construction Manager shall prepare, for the Architect's review and the Owner's approval, preliminary estimates of the Cost of the Work or the cost of program requirements using area, volume, or similar conceptual estimating techniques. If the Architect or Construction Manager suggests alternative materials and systems, the Construction Manager shall provide cost evaluations of those alternative materials and systems. The preliminary cost estimate will include other soft costs identified by Owner to allow for a proper understanding of the Owner's total Project cost and budget.

§ 3.1.6.2 As the Architect progresses with the preparation of the Schematic Design, Design Development and Construction Documents, the Construction Manager shall prepare and update, at appropriate intervals agreed to by the Owner, intervals set forth below, Construction Manager and Architect, an estimate of the Cost of the Work with increasing detail and refinement. The Construction Manager shall include in the estimate those costs to allow for the further development of the design, price escalation, and market conditions, until such time as the Owner and Construction Manager agree on a Guaranteed Maximum Price for the Work. The estimate shall be provided for the Architect's review and the Owner's approval. The Construction Manager shall inform the Owner and Architect in the event that the estimate of the Cost of the Work exceeds the latest approved Project budget, and make recommendations for corrective action. The Construction Manager will provide the following cost management services:

§ 3.1.6.2.1 The Schematic Design Documents will be prepared by Architect in consultation with Construction Manager and the Owner based upon the collective backgrounds and experiences of Architect and Construction Manager related to projects of this type, nature and size and upon interviews with and/or information received from appropriate representatives of Owner. Construction Manager will work with Architect so Construction Manager may inform the Owner the Schematic Design Documents appear to be or not be consistent with Owner's approved budget and schedule. The Schematic Design Documents, once agreed upon by Owner, Architect and Construction Manager, will replace the Owner's program. Construction Manager will keep all members of its team and Subcontractors apprised of the preliminary design requirements, schedule times and budget constraints, so as to maintain conformance with Project schedule and budget. Any assistance provided by the Construction Manager related to the design documents will be limited to constructability, budgeting, and scheduling. Construction Manager disclaims any liability for professional or design services. Moreover, Construction Manager takes no responsibility for the accuracy or completeness of any design documents.

§ 3.1.6.2.2 Upon the Owner's approval of the Schematic Design Documents, the Architect will proceed by preparing the 100% Design Development Documents. The 100% Design Development Documents will be prepared by the Architect in consultation with the Construction Manager and the Owner based upon the collective backgrounds and experiences of the Architect and the Construction Manager related to projects of this type, nature and size upon interviews with and/or information received from appropriate representatives of the Owner. The Construction Manager will work with the Architect so the Construction Manager may inform the Owner the 100% Design Development Documents appear to be or not be consistent with the Owner's approved budget and schedule. The 100% Design Development Documents, once agreed upon by the Owner, the Architect and the Construction Manager, will replace the Schematic Design Documents. When the Architect submits the 100% Design Development Documents, the Architect will identify in writing for the Owner's and Construction Manager's approval all material changes and deviations from the 100% Schematic Design Documents and the schedule. The Construction Manager will keep all members of its team and Subcontractors apprised of the detailed design requirements, schedule timelines, and budget constraints, so as to maintain conformance with the 100% Design Development Documents, schedule and budget. Any assistance provided by the Construction Manager related to the design documents will be limited to constructability, budgeting, and scheduling. Construction Manager disclaims any liability for professional or design services. Moreover, Construction Manager takes no responsibility for the accuracy or completeness of any design documents.

§ 3.1.6.2.3 Upon the Owner's approval of the 100% Design Development Documents, the Architect will proceed by preparing the 100% Construction Documents. The 100% Construction Documents will be prepared by the Architect in consultation with the Construction Manager and the Owner based upon the collective backgrounds and experiences of the Architect and the Construction Manager related to projects of this type, nature and size, and upon interviews with and/or information received from appropriate representatives of the Owner. The Construction Manager will work with the Architect so the Construction Manager may inform the Owner the 100% Construction Documents appear to be or not to be consistent with the Owner's approved budget and schedule. The 100% Construction Documents, once agreed upon by the Owner, the Architect and the Construction manager, will replace the 100%

Design Development Documents. When the Architect submits the 100% Construction Documents, the Architect will identify in writing for the Owner's and the Construction Manager's approval all material changes and deviations from 100% Design Development Documents, and the schedule. The Construction Manager will keep all members of its team and Subcontractors apprised of the detailed design requirements, schedule timelines, and budget constraints, so as to maintain conformance with the 100% Construction Documents, schedule and budget. Any assistance provided by the Construction Manager related to the design documents will be limited to constructability, budgeting, and scheduling. Construction Manager disclaims any liability for professional or design services. Moreover, Construction Manager takes no responsibility for the accuracy or completeness of any design documents.

PAGE 8

§ 3.1.11.4 The Construction Manager shall not self-perform any portion of the Work without the Owner's prior written approval. If the Construction Manager desires to self-perform any portion of the Work, the Construction Manager shall notify the Owner in writing of the Construction Manager's desire to self-perform any portion of the Work prior to the commencement of such Work. In addition, if the Construction Manager desires to self-perform portions of the Work, the Construction Manager must follow the applicable competitive bid requirements of SDCL Chap. 5-18B with respect to those portions of the Work.

PAGE 9

§ 3.2.4 In preparing the Construction Manager's Guaranteed Maximum Price proposal, the Construction Manager shall include a contingency for the Construction Manager's exclusive use to cover those costs that are included in the Guaranteed Maximum Price but not otherwise allocated to another line item or included in a Change Order. The Construction Manager's contingency will be agreed upon by the parties as part of the Guaranteed Maximum Price. The Construction Manager's contingency is separate from the Owner's contingency. The Owner and Construction Manager acknowledge the cost estimating process is not exact, and therefore, the Construction Manager's contingency is included to adjust the estimate for quantity and price estimate inaccuracies, and other eventualities which have not been taken into precise account in the establishment of the Guaranteed Maximum Price, including, but not limited to (a) unfavorable bidding from trade contractors due to market conditions, price increases, lack of competition, supply chain issues, and other variables; (b) default in payment or performance by a Subcontractor or supplier not reimbursed by the Subcontractor's payment and performance bond, if any; (c) costs of corrective work not the responsibility of the Construction Manager or its Subcontractors and suppliers of every tier; (d) unsuitable soil conditions; and (e) other conditions which result in an increase in the Cost of the Work without increasing the Guaranteed Maximum Price.

PAGE 10

§ 3.2.9 The Construction Manager shall include in the Guaranteed Maximum Price all ~~excise~~, sales, consumer, use and similar taxes for the Work provided by the Construction Manager that are legally enacted, whether or not yet effective, at the time the Guaranteed Maximum Price Amendment is executed.

PAGE 11

§ 4.1.5 During the Construction Phase, the Owner shall furnish ~~information or services information, services and decisions~~ required of the Owner by the Contract Documents with reasonable promptness. The Owner shall also furnish any other ~~information or services information, services and decisions~~ under the Owner's control and relevant to the Construction Manager's performance of the Work with reasonable promptness after receiving the Construction Manager's written request for such ~~information or services information, services, and decisions~~. The Owner acknowledges Construction Manager's performance of the Work is or may be dependent upon receipt of the Owner-furnished ~~information, services, and decisions~~. Construction Manager will not be responsible for delays in receipt of Owner-furnished ~~information, services, and decisions~~ when delays are not caused by the Construction Manager. In addition, Construction Manager will be entitled to an increase in the Contract Sum and extension of the Contract Time when cost increases and delays are due to Owner's failure to timely provide information, services, and decisions.

...

§ 4.1.7 All testing and independent inspection services required for completed Work will be secured and paid for by the Owner. The Construction Manager will cooperate and coordinate tests and inspections with testing and inspection services agencies.

PAGE 12

\$30,000.00

...

N/A

...

§ 5.2.2 Payments are due and payable upon presentation of the Construction Manager's invoice. Amounts unpaid thirty (30) days after the invoice date shall bear interest at the rate entered below, or in the absence thereof at the legal rate prevailing from time to time at the principal place of business of the Construction Manager.

...

1.5 % Monthly

...

4% of Construction Cost

PAGE 13

4%

...

TBD

§ 6.1.5 Rental rates for Construction Manager-owned equipment shall not exceed five percent (5 %) of the standard rental rate paid at the place of the Project. AED Rates will be used for Rental rates for Construction Manager-owned equipment.

...

N.A.

...

N/A

...

§ 6.3.1.1 The Architect may order minor changes in the Work as provided in Article 7 of AIA Document A201-2017, General Conditions of the Contract for ~~Construction-Construction~~, as amended.

§ 6.3.2 Adjustments to the Guaranteed Maximum Price on account of changes in the Work subsequent to the execution of the Guaranteed Maximum Price Amendment may be determined by any of the methods listed in Article 7 of AIA Document A201-2017, General Conditions of the Contract for ~~Construction-Construction~~, as amended.

§ 6.3.3 Adjustments to subcontracts awarded on the basis of a stipulated sum shall be determined in accordance with Article 7 of A201-2017, as amended, as they refer to "cost" and "fee," and not by Articles 6 and 7 of this Agreement. Adjustments to subcontracts awarded with the Owner's prior written consent on the basis of cost plus a fee shall be calculated in accordance with the terms of those subcontracts.

§ 6.3.4 In calculating adjustments to the Guaranteed Maximum Price, the terms "cost" and "costs" as used in Article 7 of AIA Document A201-~~2017~~A201-2017, as amended, shall mean the Cost of the Work as defined in Article 7 of this

Agreement and the term "fee" shall mean the Construction Manager's Fee as defined in Section 6.1.2 of this Agreement.

PAGE 14

Included in CM fees and general conditions

PAGE 15

§ 7.6.1 Premiums for that portion of ~~insurance~~ insurance, including the builder's risk insurance, and bonds required by the Contract Documents that can be directly attributed to this Contract.

PAGE 16

§ 7.7.5 The deductible portion of any losses under policies of builder's risk insurance.

PAGE 18

One calendar month ending on the 20th of each month

~~§ 11.1.3 Provided that an Application for Payment is received by the Architect not later than the day of a month, the Construction Manager will deliver to the Architect and the Owner each Application for Payment. The Architect will, within ten days after receipt of the Construction Manager's Application for Payment, either issue to the Owner a Certificate for Payment, with a copy to the Construction Manager, for such amount as the Architect determines is properly due, or notify the Construction Manager and the Owner in writing of the Architect's reasons for withholding certification in whole or in part. In this event, the Construction Manager, Architect and Owner will meet immediately and attempt to resolve the disputed amounts. If they are unable to do so, the Construction Manager may file a Claim as set forth in Article 15 of A201-2017, as amended. The Owner shall make payment of the amount certified to the Construction Manager not later than the day of the month, in dispute by electronic funds transfer within thirty (30) days of receipt of the Application for Payment by the Architect and the Owner. If an Application for Payment is received by the Architect after the application date fixed above, payment of the amount certified shall be made by the Owner not later than (thirty (30) days after the Architect receives the Application for Payment.~~

PAGE 19

5% of the cost of the Work

...

Payments made to materials suppliers

...

N/A

...

N/A

PAGE 21

1.5 % monthly

...

~~§ 12.1.1 Any Claim between the Owner and Construction Manager shall be resolved in accordance with the provisions set forth in this Article 12 and Article 15 of A201-2017. However, for Claims arising from or relating to the Construction Manager's Preconstruction Phase services, no decision by the Initial Decision Maker shall be required as a condition precedent to mediation or binding dispute resolution, and Section 12.1.2 of this Agreement shall not apply.~~
Intentionally Omitted

§ 12.1.2 The Architect will serve as the Initial Decision Maker pursuant to Article 15 of AIA Document A201-2017 for Claims arising from or relating to the Construction Manager's Construction Phase services, unless the parties appoint below another individual, not a party to the Agreement, to serve as the Initial Decision Maker. Intentionally Omitted

...

The procedures outlined in Article 15 of A201-2017, as amended, will apply.

...

Litigation in a court of competent jurisdiction
PAGE 23

All costs incurred to date plus a \$15,000 termination fee.

...

The Construction Manager shall maintain the following insurance coverages for the duration of the Preconstruction Services performed under this Agreement. If any of the requirements set forth below exceed the types and limits the Construction Manager normally maintains, the Owner shall reimburse the Construction Manager for any additional cost. Agreement, as set forth in the Exhibit B – Insurance and Bonds.

§ 14.3.1.1 Commercial General Liability with policy limits of not less than ~~(\$)~~ for each occurrence and ~~(\$)~~ in the aggregate for bodily injury and property damage.

§ 14.3.1.2 Automobile Liability covering vehicles owned, and non-owned vehicles used, by the Construction Manager with policy limits of not less than ~~(\$)~~ per accident for bodily injury, death of any person, and property damage arising out of the ownership, maintenance and use of those motor vehicles, along with any other statutorily required automobile coverage.

§ 14.3.1.3 The Construction Manager may achieve the required limits and coverage for Commercial General Liability and Automobile Liability through a combination of primary and excess or umbrella liability insurance, provided that such primary and excess or umbrella liability insurance policies result in the same or greater coverage as the coverages required under Sections 14.3.1.1 and 14.3.1.2, and in no event shall any excess or umbrella liability insurance provide narrower coverage than the primary policy. The excess policy shall not require the exhaustion of the underlying limits only through the actual payment by the underlying insurers.

§ 14.3.1.4 Workers' Compensation at statutory limits and Employers Liability with policy limits not less than ~~(\$)~~ each accident, ~~(\$)~~ each employee, and ~~(\$)~~ policy limit.

§ 14.3.1.5 Professional Liability covering negligent acts, errors and omissions in the performance of professional services, with policy limits of not less than ~~(\$)~~ per claim and ~~(\$)~~ in the aggregate.

§ 14.3.1.6 Other Insurance

(List below any other insurance coverage to be provided by the Construction Manager and any applicable limits.)

Coverage

Limits

§ 14.3.1.7 Additional Insured Obligations. To the fullest extent permitted by law, the Construction Manager shall cause the primary and excess or umbrella policies for Commercial General Liability and Automobile Liability to include the Owner as an additional insured for claims caused in whole or in part by the Construction Manager's negligent acts or omissions. The additional insured coverage shall be primary and non-contributory to any of the Owner's insurance policies and shall apply to both ongoing and completed operations.

§ 14.3.1.8 The Construction Manager shall provide certificates of insurance to the Owner that evidence compliance with the requirements in this Section 14.3.1.

~~§ 14.3.2 Construction Phase~~

~~After execution of the Guaranteed Maximum Price Amendment, the Owner and the Construction Manager shall purchase and maintain insurance as set forth in AIA Document A133™ 2019, Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee with a Guaranteed Maximum Price, Exhibit B, Insurance and Bonds, and elsewhere in the Contract Documents.~~

~~§ 14.3.2.1 The Construction Manager shall provide bonds as set forth in AIA Document A133™ 2019 Exhibit B, and elsewhere in the Contract Documents.~~

~~§ 14.4 Notice in electronic format, pursuant to Article 1 of AIA Document A201 2017, may be given in accordance with AIA Document E203™ 2013, Building Information Modeling and Digital Data Exhibit, if completed, or as otherwise set forth below:~~

~~(If other than in accordance with AIA Document E203 2013, insert requirements for delivering notice in electronic format such as name, title, and email address of the recipient and whether and how the system will be required to generate a read receipt for the transmission.)~~

~~§ 14.5 Other provisions:~~

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N/A

...

N/A

[N/A] Supplementary and other Conditions of the Contract:

...

Mr. Garrett Bischoff School Board President

Jim Weber Project Executive/Owner

Certification of Document's Authenticity

AIA® Document D401™ – 2003

I, James (Jim) Weber , hereby certify, to the best of my knowledge, information and belief, that I created the attached final document simultaneously with its associated Additions and Deletions Report and this certification at 16:35:20 ET on 03/18/2024 under Order No. 4104248239 from AIA Contract Documents software and that in preparing the attached final document I made no changes to the original text of AIA® Document A133™ – 2019, Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee with a Guaranteed Maximum Price, other than those additions and deletions shown in the associated Additions and Deletions Report.

James R Weber
(Signed)

V.P.
(Title)

3-15-2024
(Dated)