

Owner's Representative and Enhanced Owner's Representative

Construction projects, no matter the size, can be an exciting time for the school corporation and the entire community, illustrating the pride the community has in their local school corporation. With experience in all of the public school construction delivery methods (CMa, CMc, design/build, guaranteed savings contract, traditional bid/spec) and many different projects (fieldhouse, new school, complete school renovation, school renovation with additional square footage added, solar, security, transportation building, HVAC, CTE classrooms, agriculture building, roofs), EES has the expertise to help guide the process and make your project a positive experience for you from the beginning to end.

A good Owner's Representative is a vital part of a successful construction project, providing a direct line of communication between the school administration and contractor, while providing the administration the time each needs to focus on their day to day operations of running the district. As the Owner's Representative, EES provides Chief Financial Officer type services to school corporation partners to help ensure a smooth project from planning stages through final inspection and every stage in between. We believe planning and communication are keys to a successful construction project, and we created our services to enhance both.

Meet with Administration

- Discuss district's facility goals
 - What do you want to accomplish?
 - In what timeline do you want to accomplish it?
- Discuss current debt profile
 - Is your tax rate/levy at an acceptable level?
 - If not, what is the district's goal for an acceptable tax rate/levy?
 - Discuss/advise on delivery methods
- Work to
 - Develop items related to project for board agenda
 - Present, in executive session, information related to project
 - Develop criteria to select architect and construction manager
 - Recommend steps to select and enter into contract with architect and construction manager
 - Advise district on participants and function of project committee members

Work with municipal advisor and/or underwriter

- Strategy for sale of bonds
- Long term planning for tax rate/levy management
- Sale of future bonds
- Participate in ratings call to the extent possible (if necessary)
- Ensure proper paperwork uploaded to Gateway prior to closing of bond sale

Work with bond counsel

- Ensure project can be completed with affirmative legal opinion from bond counsel
- Work with bond counsel to determine timeline for project
- Ensure compliance with legal advertisements
- Obtain legal documents from bond counsel and arrange for execution of documents by board and administrative personnel
- Obtain County Voter Registration Certificate (if necessary)

Participate in pre-construction meetings

- Work on behalf of the school corporation to ensure its interests are represented appropriately
- Coordinate school schedules with construction personnel
- Communicate construction timelines to school personnel
- Provide "before" pictures and/or video of areas involved in scope of project
- Provide written update after each meeting

Participate in construction process

- Work on behalf of the school corporation to ensure its interests are represented appropriately.
- Provide written update after each meeting
- Provide progress photos/videos of construction for use in marketing materials
- Participate in regular project walkthroughs to ensure project is progressing according to plan
- Notify construction personnel of any concerns
- Review contractors' payment requests and advise superintendent to approve or disapprove
 - Send approved payment request to Treasurer or Trustee Bank for payment
- Participate in Punch list walkthrough

Provide final report on entire project

*EES will not replace your municipal advisor, local counsel, or bond counsel. We will work with your municipal advisor, local counsel, and bond counsel to ensure a successful project.



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An Owner's Representative is a vital part of a successful construction project, providing a direct line of communication between the superintendent and contractor, while providing the superintendent the time he/she needs to focus on their day to day operations of running the district. As the Owner's Representative, EES provides Chief Financial Officer type services to school partners to help ensure a smooth project from planning stages through final inspection and every stage in between. We believe planning and communication are keys to a successful construction project, and we created our services to enhance both.

Meet with Superintendent

- Discuss district's facility goals
 - What do you want to accomplish?
 - In what timeline do you want to accomplish it?
- Discuss current debt profile
 - Is your tax rate/levy at an acceptable level?
 - If not, what is the district's goal for an acceptable tax rate/levy?
 - Discuss/advise on delivery method
- Work with superintendent to
 - Develop items related to project for board agenda
 - Present, in executive session, information related to project
 - Develop criteria to select architect and construction manager
 - Recommend steps to select and enter into contract with architect and construction manager

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