

OLDHAM COUNTY BOARD OF EDUCATION

CONCERN

Consider Recommendation of the revised BG-1 form and Award of a Contract for BHS/OCHS Improvements project.

DISCUSSION

November 18, 2024 the Board approved the construction documents for the BHS/OCHS Improvements project.


On January 21, 2025, bids for the project were received, opened, and read aloud for the above referenced project. Two (2) contractors submitted a lump sum bid. The lowest and best bid submitted, complying with the plans and specifications, was received from Marrillia Design and Construction in the base bid amount of \$38,600,000.00. (Refer to the attached bid tabulation.) Three Alternates were included and have been reviewed by the Design Team. Alternate No.1 for Roof Mounted Photovoltaics (add of \$1,689,636.00), Alternate No.2 for Medium Voltage Service (add of \$1,573,929.00) and Alternate No.3 for Owner Preferred Hardware (no cost change).

After thorough review by Studio Kremer Architects and Brent Bohannon, Director of Facilities Management, it is the recommendation that the contract be awarded to Marrillia Design and Construction, 794 Manchester Street, Lexington, KY 40508 for the lump sum amount of \$40,173,929.00. Including the low base bid and accepting alternates bids No. 2 & No. 3.


RECOMMENDATION

Approve the Award of Contract for the BHS/OCHS Improvements project Marrillia Design and Construction, 794 Manchester Street, Lexington, KY 40508 in the lump sum amount of \$40,173,929.00 and hereby authorizes the Director of Facilities Management to execute the necessary documentation and approve the revised BG-1 total project cost of \$47,485,000.

On a motion by _____, seconded by _____, the Board approved Award of a Contract for BHS/OCHS Improvements project to Marrillia Design and Construction, 794 Manchester Street, Lexington, KY 40508 for the lump sum amount of \$40,173,929.00 and the revised BG-1 total project cost of \$47,485,000 for submission to the Kentucky Department of Education, and hereby authorize the Director of Facilities Management to execute the necessary documentation. (,)



Carley Clem, Board Chair



Dr. Jason Radford, Superintendent/Secretary

BG1 Project Application Form (Revised)

(Ref# 21594)

Form Status: Saved

Tier 1 Project: Buckner Alternative High School and OCHS Improvements Project

BG Number: 24-104

District: Oldham County (HB678) (465)

Status: Active

Phase: Project Initiation (View Checklist)

Construction Delivery Method

General Contractor

Procurement Standard

Model Procurement

Reason for Revision

Post bid revision

Emergency

No

Project Type and Description

Applicable Items

New Building	No
Addition	Yes
Major Renovation	No
GESC	No
Roofing	No
HVAC	No
ADA Compliance	No
Life Safety	No
Security	No
Minor Project	No
New Relocatable Classroom	No
Equipment / Furnishings Procurement	No
Site Acquisitions	No

District Facility Plan (DFP)

Compliance with 702 KAR 4:180 and 702 KAR 4:160

DFP Approval Date 2/1/2023

DFP Priority

1b.1 - New Buckner Alternative High School / ELL Facility (A5 Center)

Estimated Cost: \$4,993,290.00

Facility: No Data

5.16.3 -

Estimated Cost: \$8,223,088.00

Facility: No Data

Project Not Listed on DFP No

Inventory

Facility Name

OLDHAM COUNTY HIGH SCHOOL (B10001415)

BUCKNER ALTERNATIVE HIGH SCHOOL (B10001418)

Scope

Provide a Complete Narrative of the Proposed Project

Replacement of existing Buckner Alternative High School building. New building to include BAHS, Community Outreach and Specialized Non-Traditional, and Little Colonels programs. Scope to include a new spectator gym, reconfiguration of the junior lot and realignment of Colonels Drive.

Work Related to Project But Excluded from this BG1 Scope

Financial Plan

Probable Costs

Proposed Plan to Finance Application

Total Construction Cost	\$40,173,929.00
Construction Contingency	\$2,008,696.50
Architect / Engineer Fee	\$2,109,131.28
Construction Manager Fee	
Fiscal Agent Fee	\$256,684.22
Bond Discount	\$949,700.00
Equipment / Furnishings	\$902,500.00
Equipment / Computers	\$902,500.00
Technology Network System (KETS)	\$19,500.00
Site Acquisition	
Site Survey	\$16,000.00
Geotechnical Investigations	\$12,500.00
Special Inspections	\$50,000.00
Commissioning	\$50,000.00
Advertising	\$1,000.00
Printing	\$14,000.00

Other Probable Costs

Title	Amount
Permits & Fees	\$5,000.00
Plan Review	\$13,859.00
No Data	
Total Project Cost	\$47,485,000.00

Funds Available

Bond Sale - SFCC	
Bond Requirement - SFCC	
Local FSPK Bond Sale	\$47,485,000.00
Local General Fund Bond Sale	
Cash - SFCC Requirement	\$0.00
Cash - Building Fund	\$0.00
Cash - Capital Outlay	
Cash - Investment Earnings	
Cash - General Fund	
City - County - KYTC Reimbursement	
KETS	

Residual Funds

BG Number	Fund Source	Amount
No Data	No Data	No Data
Residual Funds Total:		\$0.00

Other Available Funds

Title	Amount
No Data	
No Data	
No Data	
Total Funds Available	\$47,485,000.00

BG1 Signature Page (Online Form Ref# 21594)

The signing of this financial document certifies the above stated funds are available and designated for this project during this fiscal year.

Superintendent

Date

Finance Officer

Date

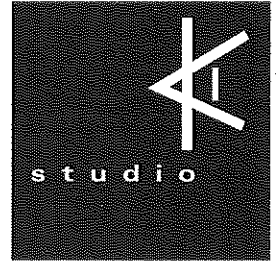
Chairman

Date

NOTE: Any district anticipating the financing of this and/or other projects in a combined school revenue Bond should discuss the financing with the Director/Branch Manager, KDE - District Financial

January 28, 2025

Brent M. Bohannon, AIA, LEED AP
Director of Facilities Management
Oldham County Schools
6165 W. Highway 146
Crestwood, KY 40014



PROJECT: Buckner High School and Oldham County High School Improvements
BG# 24-104 | ska# 2023-45

Mr. Bohannon:

On January 21, 2025, two (2) bids were received for the above referenced project. Marrillia Design and Construction of Lexington, Kentucky submitted the low Base Bid amount of Thirty Eight Million Six Hundred Thousand dollars and no cents (\$38,600,000.00).

After the Bids were opened, the Design Team began the review of the Unit Prices and additional clarifications have been requested from Marrillia Design and Construction. Once this review is complete and agreed upon, the list of acceptable Unit Prices will be attached to a Contract for construction. The subcontractor and manufacturer lists were reviewed, references contacted, and with modifications are found to be acceptable. The bonding company (Fidelity and Deposit Company of Maryland) was reviewed, and it was determined that they have an A.M. Best Company rating of "A+", which meets the requirements of the Contract Documents.

Three Alternates were included and have been reviewed by the Design Team. Alternate No.1 for Roof Mounted Photovoltaics (add of \$1,689,636.00), Alternate No.2 for Medium Voltage Service (add of \$1,573,929.00) and Alternate No.3 for Owner Preferred Hardware (no cost change). All Alternates have been reviewed by the Design Team and the cost for these Alternates is acceptable should the board elect to accept. Please refer to the attached letter from CMTA, Inc. for additional information related to Alternate No.1 and No.2.

Please contact me if there are any questions about the information provided.

Sincerely,
Studio Kremer Architects

Matthew Harris, AIA
Architect | Partner

c: file

Attachments:
Final Bid Tab
Bid Surety Review
Recommendation Letter from CMTA, Inc.

studio kremer architects

1231 S Shelby St, Louisville, KY 40203
TEL 502.499.1100 FAX 502.499.1101

ska# 2023-45

2:00 pm

[illegible]

AM Best Rating Services

The Fidelity and Deposit Company of Maryland

BestLink  **AMB #: 000387 NAIC #: 39306 FEIN #: 133046577**

Mailing Address

1299 Zurich Way, 10Th Floor
Schaumburg, Illinois 60196-1056
[United States](#)

Web: www.zurichna.com

Phone: 800-382-2150

[View Additional Address Information](#)

AM Best Rating Unit: [AMB #: 050457 - Zurich Insurance Group Ltd](#)

Assigned to insurance companies that have, in our opinion, a superior ability to meet their ongoing insurance obligations.



View additional [news, reports and products](#) for this company.

Based on AM Best's analysis, [050457 - Zurich Insurance Group Ltd](#) is the **AMB Ultimate Parent** and identifies the topmost entity of the corporate structure. View a list of [operating insurance entities](#) in this structure.

Best's Credit Ratings

Financial Strength View Definition

Rating (Rating Category): A+ (Superior)
Affiliation Code: g (Group)
Outlook (or Implication): Stable
Action: Affirmed
Effective Date: November 26, 2024
Initial Rating Date: June 30, 1922

Best's Credit Rating Analyst

Rating Office: A.M. Best Rating Services, Inc.
Financial Analyst II: Thomas Keelan
Director: Edin Imsirovic
Note: See the Disclosure information Form or Press Release below for the office and analyst at the time of the rating event.

Long-Term Issuer Credit View Definition

Rating (Rating Category): aa (Superior)
Outlook (or Implication): Stable
Action: Upgraded
Effective Date: November 26, 2024
Initial Rating Date: September 14, 2004

Disclosure Information

Disclosure Information Form

View AM Best's [Rating Disclosure Form](#)

Press Release

[AM Best Upgrades Issuer Credit Ratings of Zurich Insurance Group Ltd and Its Main Rated Subsidiaries](#)
November 26, 2024

Financial Size Category View Definition

Financial Size Category: XV (Greater than or Equal to USD 2.00 Billion)

u Denotes Under Review Best's Rating

Rating History

A.M. Best has provided ratings & analysis on this company since 1922.

Financial Strength Rating

Effective Date	Rating
November 26, 2024	A+
November 22, 2023	A+
October 21, 2022	A+
October 01, 2021	A+
October 02, 2020	A+

Long-Term Issuer Credit Rating

Effective Date	Rating
November 26, 2024	aa
November 22, 2023	aa-
October 21, 2022	aa-
October 01, 2021	aa-
October 02, 2020	aa-

Best's Credit & Financial Reports



Best's Credit Report - financial data included in Best's Credit Report reflects the data used in determining the current credit rating(s) for AM Best Rating Unit: AMB #: 050457 - Zurich Insurance Group Ltd.



Best's Credit Report - Archive - reports which were released prior to the current Best's Credit Report.



Best's Financial Report - financial data included in Best's Financial Report reflects the most current data available to AM Best, including updated financial exhibits and additional company information, and is available to subscribers of Best's Insurance Reports.



Best's Financial Report - Archive - reports which were released prior to the current Best's Financial Report.

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Press Releases

Date ▼	Title
Nov 26, 2024	AM Best Upgrades Issuer Credit Ratings of Zurich Insurance Group Ltd and Its Main Rated Subsidiaries
Nov 22, 2023	AM Best Affirms Credit Ratings of Zurich Insurance Group Ltd and Its Main Rated Subsidiaries
Oct 21, 2022	AM Best Affirms Credit Ratings of Zurich Insurance Group Ltd and Its Main Rated Subsidiaries
Oct 01, 2021	AM Best Revises Issuer Credit Rating Outlook to Positive for Zurich Insurance Group Ltd and Its Main Rated Subsidiaries
Oct 02, 2020	AM Best Affirms Credit Ratings of Zurich Insurance Group Ltd and Its Main Rated Subsidiaries
Sep 25, 2019	AM Best Affirms Credit Ratings of Zurich Insurance Group Ltd and Its Main Rated Subsidiaries
Sep 19, 2018	A.M. Best Affirms Credit Ratings of Zurich Insurance Group Ltd and its Main Rated Subsidiaries
Dec 08, 2017	A.M. Best Revises Outlooks to Stable for Zurich Insurance Group Ltd and Its Main Rated Subsidiaries

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25 items in 3 pages

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[Locations](#)



Building Science Leadership

January 22, 2025
Oldham County Schools
Brent Bohannon
Director of Facilities

Re: Buckner HS and Oldham HS Improvement – BG# 24-104 – Alternates #1 and #2

Mr. Bohannon,

CMTA has completed its review of the bids submitted January 21, 2025, for the above referenced project, specifically Alternates #1 and #2.

The bid for Alternate #1 for providing photovoltaics (solar) on the roof of the new structure came in at \$1,689,636. This is proportionate to other projects when compared by \$/W of installed solar production. Based on past utility bills, this solar array would generate approximately \$76K in savings for the district's general fund.

The bid for Alternate #2 for providing Medium Voltage Gear came in at \$1,573,929, comparable to other medium voltage projects of similar size. Using past utility bills, it was determined that the Alternate #1 would save approximately \$168K per year in utility bills, which are paid through general funds, by eventually combining eleven meters on the Buckner campus into one service. This saving is provided by combining multiple demand based electrical meters into one service for the whole Buckner campus, resulting in a lower \$/kWh rate.

It should be noted that the base bid includes heating and cooling to be provided through a geothermal wellfield. The current Inflation Reduction Act legislation allows for non-taxable entities, such as Oldham County Schools, to benefit financially from installing sustainable energy solutions in the form of a direct payment from the federal government. The geothermal design of BHS/OCHS Gym allows Oldham County Schools to receive 30% back on geothermal related costs as a direct payment check after substantial completion of approximately \$1.4M, this would cover 92% of the cost for Alternate #2. The installation of solar would also take advantage of this same legislation, resulting in an additional \$506K back to the district.

The acceptance of both add-alternates results in an estimated \$7,150,000 savings for OCS over the next 30 years. It is CMTA's recommendation that both alternates be accepted to fully recognize the benefits of our design.

Sincerely,

Brett M. Lawson
Project Manager
CMTA, Inc., a Legence Company
blawson@cmta.com