

DANNY CLEMENS, DIRECTOR
TRACY PARSLEY, MAINTENANCE SUPERVISOR
THOMAS STOKES, CUSTODIAL SUPERVISOR
GEORGE BROCK, ENERGY MANAGER

DEPARTMENT OF FACILITIES

MEMO

TO: Dr. Jesse Bacon, Superintendent
FROM: Danny Clemens, Director of Facilities
Date: March 5, 2025
RE: OMES BP2 - Trane Controls Close Out **DC**

Documentation includes the Substantial Completion G704 Certificate and BG-4 to proceed with financial and FACPAC close out of Bullitt County Public Schools' Contract with Trane US for the Controls Scope of Work on the new Old Mill Elementary Project (BG-20-142).

I recommend approval of this request.

Attached paperwork is listed below with *action items* noted for each:

- BP2 - Belimo - DPO Reconciliation Change Order - OMES 20-142 - BCPS PO 21904059 – For Board Signature
- G704-2017 - Substantial Completion - BP2 Trane - OMES 20-142 – For Board Signature
- BG-4 - OMES BP2 - Controls - Trane US – For Board Signature

OUR MISSION IS TO INSPIRE AND EQUIP OUR STUDENTS TO SUCCEED IN LIFE

BULLITT COUNTY PUBLIC SCHOOLS IS AN EQUAL EDUCATION AND EMPLOYMENT INSTITUTION



AIA Document G701 - 2017

Change Order

PROJECT: *(Name and address)*
 New BCPS Elementary School - 800-
 Student
 199 Golden Wing Road

OWNER: *(Name and address)*
 Bullitt County Public Schools Board of
 Education
 1040 Hwy 44 East
 Shepherdsville, KY 40165

CONTRACT INFORMATION:
 Contract For: General Construction
 Date: November 09, 2020

ARCHITECT: *(Name and address)*
 Studio Kremer Architects, Inc.
 1231 S. Shelby Street
 Louisville, KY 40203

CHANGE ORDER INFORMATION:
 Change Order Number: BP2 - Belimo
 DPO Reconciliation BCPS PO# 21904059
 Date: March 24, 2025

CONTRACTOR: *(Name and address)*
 Belimo Air Controls, Inc.
 33 Turner Road
 Danbury, CT 06810

THE CONTRACT IS CHANGED AS FOLLOWS:

(Insert a detailed description of the change and, if applicable, attach or reference specific exhibits. Also include agreed upon adjustments attributable to executed Construction Change Directives.)

DPO Reconciliation for unbilled materials.

The original Contract Sum was	\$ 8,365.85
The net change by previously authorized Change Orders	\$ 0.00
The Contract Sum prior to this Change Order was	\$ 8,365.85
The Contract Sum will be decreased by this Change Order in the amount of	\$ 431.75
The new Contract Sum including this Change Order will be	\$ 7,934.10

The Contract Time will be unchanged by Zero (0) days.
 The new date of Substantial Completion will be

NOTE: This Change Order does not include adjustments to the Contract Sum or Guaranteed Maximum Price, or the Contract Time, that have been authorized by Construction Change Directive until the cost and time have been agreed upon by both the Owner and Contractor, in which case a Change Order is executed to supersede the Construction Change Directive.

NOT VALID UNTIL SIGNED BY THE ARCHITECT, CONTRACTOR AND OWNER.

Studio Kremer Architects, Inc.

Catherine Noble Ward
 ARCHITECT *(Firm name)*

SIGNATURE

Catherine Noble Ward, AIA
 PRINTED NAME AND TITLE

3-03-2025
 DATE

Belimo Air Controls, Inc.

Trane - Brad Abele
 CONTRACTOR *(Firm name)*

SIGNATURE

Brad Abele - ACM
 PRINTED NAME AND TITLE

2/22/25
 DATE

Bullitt County Public Schools Board of
 Education

OWNER *(Firm name)*

SIGNATURE

Dr. Jesse Bacon, Superintendent
 PRINTED NAME AND TITLE

DATE

FACPAC PO Change Order Supplemental Information Form (Ref# 61595)

Form Status: Saved

Tier 1 Project: 800 Student Elementary School

BG Number: 20-142

District: Bullitt County (HB678) (071)

Status: Active

Phase: Project Initiation (View Checklist)

Contract: Harshaw Trane, 0002, Building Automation and Temperature Controls

Type: General Contractor

Proposed

Purchase Order Number: 003

Vendor Name: Belimo

Change Order Number	DPO-03 - Reconciliation
Time Extension Required	No
Date Of Change Order	1/27/2025
Change Order Amount To Date	Decrease

Construction Contingency

Calculations below are project wide. Remaining negative Construction Contingency may require the submission of a revised BG1.

Current Approved Amount	\$1,402,905.14
Net Approved COs	\$111,517.69
Remaining After Approved COs	\$1,291,387.45
Net All COs	\$-84,452.58
Remaining After All COs	\$1,487,357.72

This Requested Change Order Amount (\$431.75)

+/-

Change In A/E Fee This Change Order \$0.00

+/-

Change In CM Fee This Change Order \$0.00

+/-

Remaining Construction Contingency \$1,487,357.72

Balance

Contract Change Requested By Architect/Engineer

Contract Change Reason Code DPO Reconciliation

Change Order Description And Justification

DPO Reconciliation for unbilled material costs.

Cost Benefit To Owner

This is a credit to the Owner for unbilled materials.

Contract unit prices have been utilized No to support the cost associated with this change order.

Detailed Cost Breakdown

Contract unit prices have not been utilized, provide a detailed cost breakdown which separates labor, material, profit and overhead.

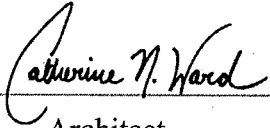
Detail Item	Amount	Percent of Total
Labor		0.00%
Materials	\$431.75	100.00%
Profit and Overhead		0.00%
Bond Insurance		0.00%
Cost Breakdown Total:	\$431.75	

Cost for this Change Order supported No by an alternate bid or competitive price quote

Explain Why

This is a credit to the Owner for unbilled materials.

Change Order Supplemental Information Form Signature Page (Online Form Ref# 61595)



Architect

03-03-2025

Date

N/A

Construction Manager

Date

Finance Officer

Date

Local Board of Education Designee

Date



Bill To

BULLITT COUNTY BOARD OF ED
1040 HIGHWAY 44 EAST
SHEPHERDSVILLE, KY 40165
Phone: 502-869-8000

PHONE (502) 869-8000
FAX (502) 869-8019

HOURS Monday - Friday
8:00 a.m. - 4:30 p.m.
www.bullittschools.org

Purchase Order

Fiscal Year 2021

Page: 1 of 1

THIS NUMBER MUST APPEAR ON ALL INVOICES,
PACKAGES AND SHIPPING PAPERS.

Purchase Order # 21904059

Delivery must be made within doors of specified destination.

Vendor

BELIMO AIRCONTROLS INC
33 TURNER RD
DANBURY, CT 06810

Ship To

BULLITT COUNTY MAINTENANCE
325 E SECOND STREET
SHEPHERDSVILLE, KY 40165

Table with 4 columns: VENDOR PHONE NUMBER, VENDOR FAX NUMBER, REQUISITION NUMBER, DELIVERY REFERENCE. Includes rows for requisition number 4543 and department/location 361 CONSTRUCTION.

The Above Purchase Order Number Must Appear On All Correspondence - Packing Sheets And Bills Of Lading

- 1. Backorders will not be processed for payment.
2. Conflicts in billing shall be directed to the location contact person and not the Office of Finance.

NEW EAST ELEMENTARY
BG 20-142

Table with 6 columns: ITEM #, DESCRIPTION / PART #, QTY, UOM, UNIT PRICE, EXTENDED PRICE. Row 1: 1 CONTROL VALVES, DAMPER ACTUATORS, 1.0, EACH, \$8,365.85, \$8,365.85

GL SUMMARY table with 2 columns: Description (0003610 - 0450 - 8113) and Amount (\$8,365.85)

Receivership: x
Date:
Amount: \$
Partial Payment (PO remains open)
Final Payment (Liquidate PO)

Summary table with 2 columns: Description and Amount. Includes Total Ext. Price (\$8,365.85), Total Sales Tax (\$0.00), Total Freight (\$0.00), Total Discount (\$0.00), Total Credit (\$0.00), and Purchase Order Total (\$8,365.85).

FACPAC Purchase Order Form (Ref# 48447)

Form Status: Saved

Tier 1 Project: 800 Student Elementary School

BG Number: 20-142

District: Bullitt County (071)

Status: Active

Phase: Project Initiation (View Checklist)

Contract: Harshaw Trane, 0002, Building Automation and Temperature Controls

Type: General Contractor

Proposed

District PO Number	003
Ky Sales Tax Exempt Number	B-584
Date of Order	11/16/2020
Specification Section	25 04 00
Material Description / Category	Control Valves, Damper Actuators
Requested By	Harshaw Trane
Vendor Name	Belimo
Vendor Address	
33 Turner Road	
Danbury, CT 06810	
Vendor Phone	800-543-9038
Vendor Email	customerservice@us.belimo.com
Bill To	Bullitt County Board of Education
Bill To Address	
1040 Highway 44 East	
Shepherdsville, KY 40165	
Ship To	New 800-Student Elementary Project
Ship To Address	
Golden Wing Road	
Mt Washington, KY	
C/O Harshaw Trane	
Attention Of	Tim Rowe - Harshaw Trane

Contacts

The following project contacts must be notified 48 hours in advance of delivery to jobsite.

Contact Name

Contact Phone

Materials

Furnish the necessary materials to complete the following bid package(s) / specification section(s) in its entirety. All materials shall be in accordance with the requirements of the Contract.

Item Description	Item Number	Quantity	Unit Price	Total
Control Valves, Damper Actuators	1	1	\$8,365.85	\$8,365.85
Purchase Order Total:				\$8,365.85

Authorization

Owner Authorization Date	11/16/2020
Vendor Authorization Date	11/16/2020

Purchase Order Signature Page (Online Form Ref# 48447)

Belimo - See below

12/14/2020

Vendor

Date

Owner

Rebecca Supt.
asst Supt.

12/15/20
12/21/2020 Date

Terms and Conditions

1. Drawings, catalogs, cut sheets, or samples shall be submitted for approval.
2. All invoices shall be sent to the contractor/subcontractor designated on the purchase order for approval. No invoices shall be sent directly to the Board of Education (Owner) for payment.
3. All invoices shall reference the purchase order number.
4. No change in, modification of, or revision of this order shall be valid unless in writing and signed by the Owner.
5. Vendor agrees to observe and comply with all applicable federal, state and local laws, rules, ordinances and regulations in performance of this order.
6. Vendor shall not assign this order or any right hereunder without first having obtained the written consent of the Owner.
7. Deliveries are to be made in accordance with the Owner's schedule, as directed by the General Contractor (GC), Construction Manager (CM) or Qualified Provider (QP).
8. The Owner may cancel this purchase order in whole or in part in the event that the vendor fails or refuses to deliver any of the items purchased, within the time provided, or otherwise violates any of the conditions of this purchase order, or if it becomes evident that the vendor is not providing materials in accordance with the specifications or with such diligence as to permit delivery on or before the delivery date.
9. The vendor agrees to deliver the items to the supplied hereunder free and clear of all liens, encumbrances and claims.
10. If any of the goods covered under this purchase order are found to be defective in material or workmanship, or otherwise not in conformity with the requirements of this order, the Owner, in addition to the other rights which it may have under warranty or otherwise, shall have the right to reject the same or require that such articles or materials be corrected or replaced promptly with satisfactory materials or workmanship.
11. By acknowledging receipt of this order, by performing the designated work or any portion thereof, or by shipping the designated goods, the vendor agrees to the terms and conditions outlined.
12. This purchase order shall be governed in all respects by the laws of the Commonwealth of Kentucky.

- 13. In the event the quantities of materials supplied via this purchase order are insufficient to complete the work, the GC, CM or QP shall, at no expense to the Owner, provide such materials as necessary to complete the work.
- 14. In the event that at the completion of the work the vendor has not submitted invoices totaling the value of this purchase order, this purchase order shall be considered complete and closed.

Signature: *Robert J. Greco*

BELIMO Representative: Robert J. Greco
Title: VP, Finance Americas
Date: 12/14/2020

Signature: *Steven A. Sranitzke*

BELIMO Representative: Steven A. Sranitzke
Title: VP, US Sales
Date: 12/14/2020

FACPAC BG4 Form (Ref# 31347)

Form Status: Saved

Tier 1 Project: 800 Student Elementary School

BG Number: 20-142

District: Bullitt County (HB678) (071)

Status: Active

Phase: Project Initiation (View Checklist)

Contract: Harshaw Trane, 0002, Building Automation and Temperature Controls

Type: General Contractor

Proposed

Project Construction Cost

Original Contract Amount	\$277,931.60
Net Total of Change Orders to Contract	\$0.00
Original Purchase Order Total	\$118,288.40
Net Total of Change Orders to Purchase	(\$431.75)
Orders	
Total Cost of Construction	\$395,788.25

Verification of Required Approvals by Other Regulatory Agencies**Office of Housing, Buildings, and Construction**

Certificate Of Occupancy Date	1/5/2023
Plumbing Certificate Date	12/15/2022
Electrical Certificate Date	12/28/2022
Fire Alarm Certificate Date	12/20/2022
Sprinkler Certificate Date	9/1/2022
Boiler Certificate Date	
Range Hood Suppression Date	12/8/2022
Verification of Approval - Other	
Verification of Approval - Other Date	

Natural Resources and Environmental Protection Cabinet

Sewage Disposal Certificate Date	
Natural Resources & Environmental Protection Cabinet - Other	
Natural Resources & Environmental Protection Cabinet - Other Date	

Close Out

Punch List Completed Date	
Record Drawings Completed Date	9/29/2023
Warranty & Guarantees Information Provided Date	9/29/2023
Owner Training on Systems Date	

Verification of Payment of Debts and 1/29/2025
Claims to Date
Close Out - Other
Close Out - Other Date
BG4 Date 2/28/2025
BG4 Board Order Date

BG4 Signature Page (Online Form Ref# 31347)

The work performed under this contract has been reviewed and found to be substantially complete, according to the plans and specifications approved by the Kentucky Department of Education.

Catherine N. Ward

Architect

3-03-2025

Date

Engineer

Date

Trane - Brad Abele Paul Abu

Contractor / Construction Manager

2/28/25

Date

Local Board of Education Designee

Date

AIA® Document G704® – 2017

Certificate of Substantial Completion

PROJECT: *(name and address)*
 New BCPS Elementary School - 800-
 Student
 199 Golden Wing Road

CONTRACT INFORMATION:
 Contract For: General Construction
 Date: November 09, 2020

CERTIFICATE INFORMATION:
 Certificate Number: 002
 Date: March 24, 2025

OWNER: *(name and address)*
 Bullitt County Public Schools Board of
 Education
 1040 Hwy 44 East
 Shepherdsville, KY 40165

ARCHITECT: *(name and address)*
 Studio-Kremer Architects, Inc.
 1231 S. Shelby Street
 Louisville, KY 40203

CONTRACTOR: *(name and address)*
 Trane U.S.
 12700 Plantside Drive
 Louisville, KY 40299

The Work identified below has been reviewed and found, to the Architect's best knowledge, information, and belief, to be substantially complete. Substantial Completion is the stage in the progress of the Work when the Work or designated portion is sufficiently complete in accordance with the Contract Documents so that the Owner can occupy or utilize the Work for its intended use. The date of Substantial Completion of the Project or portion designated below is the date established by this Certificate.
(Identify the Work, or portion thereof, that is substantially complete.)

Studio Kremer
 Architects, Inc.

Catherine N. Ward
 SIGNATURE

Catherine Noble Ward,
 AIA, Partner

January 4, 2023

ARCHITECT *(Firm Name)*

PRINTED NAME AND TITLE

DATE OF SUBSTANTIAL COMPLETION

WARRANTIES

The date of Substantial Completion of the Project or portion designated above is also the date of commencement of applicable warranties required by the Contract Documents, except as stated below.
(Identify warranties that do not commence on the date of Substantial Completion, if any, and indicate their date of commencement.)

WORK TO BE COMPLETED OR CORRECTED

A list of items to be completed or corrected is attached hereto, or transmitted as agreed upon by the parties, and identified as follows:
(Identify the list of Work to be completed or corrected.)

The failure to include any items on such list does not alter the responsibility of the Contractor to complete all Work in accordance with the Contract Documents. Unless otherwise agreed to in writing, the date of commencement of warranties for items on the attached list will be the date of issuance of the final Certificate of Payment or the date of final payment, whichever occurs first. The Contractor will complete or correct the Work on the list of items attached hereto within () days from the above date of Substantial Completion.

Cost estimate of Work to be completed or corrected: \$0.00

The responsibilities of the Owner and Contractor for security, maintenance, heat, utilities, damage to the Work, insurance, and other items identified below shall be as follows:

(Note: Owner's and Contractor's legal and insurance counsel should review insurance requirements and coverage.)

The Owner and Contractor hereby accept the responsibilities assigned to them in this Certificate of Substantial Completion:

Trane U.S.
 CONTRACTOR *(Firm Name)*

Brad Abele
 SIGNATURE

Brad Abele-ACM 2/28/25
 PRINTED NAME AND TITLE DATE

Bullitt County Public
 Schools Board of
 Education

OWNER *(Firm Name)*

SIGNATURE

Dr. Jesse Bacon,
 Superintendent
 PRINTED NAME AND TITLE

DATE

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User Notes:

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