



**The Mission of the Miller County R-III School District in partnership with our students, community, parents and teachers is to instill leadership, scholarship, and citizenship in all learners for a shared commitment of excellence.**

Mr. Jason Price  
Superintendent

Mrs. Bobbie Grant  
Principal

Mrs. Mara Wilkerson  
Special Services

**Professional, Owner Representative, Services  
Request for Qualifications**

**Introduction**

The Miller County R-III School District (herein after Owner) is requesting qualifications for Owner's Representation services to facilitate the referendum planning, pre-construction and construction of gymnasium addition and renovations.

**Background**

Owner

The Miller County R-III School District is a rural district of approximately 72 square miles lying entirely in Miller County. The school is located in the town of Tuscumbia, which is the county seat of Miller County. Farming is the main industry of the area. Cattle, turkey and hog farms are predominate with some row crop farming done along the Osage River. Many of the district's residents supplement the farm income with jobs in neighboring communities of Jefferson City, Eldon and Lake of the Ozarks.

Project Description and Schedule

The proposed project will include:

The district will put a bond referendum to the public in April 2020. The bond is for the construction of a new gymnasium and potential renovations of the existing facility. The district is seeking an Owner's Representative to assist with the preparation of information and coordination of the intended project from public approval to project completion tentatively scheduled for July 2021. These services will include, but are not limited to the assistance in procuring materials testing, geotechnical investigation, and site surveys. In addition to working with the District to review site/building plans, change of work orders, and other key project initiatives, the Owners Representative will be expected to attend Board of Education meetings.

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Table with 2 columns: Task and Date. Tasks include Design Firm Contract Award, Anticipated Bond Approval, Design, Bid Project, Award General Contractor Contract, and Construction. Dates range from February 2020 to July 2021.

Scope of Services & Deliverables

Introduction

The Owner's Representative shall serve as the Owner's principal point of contact and liaison between the architect, contractors, and other consultants and vendors throughout the project.

1. General Services

- 1.1. Owner's Representative, in general, shall have primary management responsibility for the Project and shall coordinate all Project matters.
1.2 Owner's Representative shall maintain an organized filing system for Project documents and records.
1.3. Owner's Representative shall schedule, attend, conduct, record, and assist the Owner at Project meetings.

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Steve Wilson President, Debra Rogers Vice President, Gayla Luttrell Secretary, Greg Hawken Member, Louie Gregoire Member, David Grimwood Member, Alisha Cline Member, Weston Ash Member. Address: 526 School Road PO Box 1Tuscumbia, Missouri 65082 573-369-2375

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prepared by Owner's Representative. Owner's Representative shall review for accuracy the minutes of such meetings prepared by either the Architect, Contractor, or others. Owner's Representative shall clarify, amend and report any discrepancies affecting the Project.

1.4. Owner's Representative shall furnish to the Owner timely reports containing (a) the status of the Project; (b) a comparison of the Project budget to costs incurred through the date of the report; (c) a comparison of the Project schedule to the work actually completed through the date of the report; (d) any revision to the Project schedule or Project budget made during the time period covered by the report; (e) a summary of change orders made during the time period covered by the report; (f) a list of all pending change orders and all outstanding issues requiring action or approval by Owner; (g) the status of any governmental requirements and activities required to facilitate approval of the Project; and (h) any other reports concerning the Project as Owner may reasonably request.

1.5. Owner's Representative shall provide financial oversight services for the Project, including but not limited to (a) preparing budgets; (b) preparing monthly variance reports; (c) monthly Project payment application processing related to assembling, reviewing and forwarding to Owner for payment the invoices from the Architect, Contractors and other consultants; and (d) processing Contractors' applications for payment.

## **2. Pre-Referendum, Implementation Planning, Total Program Budgeting and Operation Impact Planning Services**

2.1 Owner's Representative shall advise the Owner with regards to the constructability, schedule, site logistics and construction budget of the proposed project(s).

2.2 Owner's Representative shall work with the District's financial representatives to help prepare budget forecasts and other related data required to support the issuance of the referendum.

2.3 Owner's Representative shall participate in pre referendum community engagement activities (up to 5 separate engagements should be anticipated).

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**3. Consultant Procurement Services**

3.1. Owner’s Representative shall review information relevant to the Project, including predesign studies, preliminary site plans, current building program/utilization, Owner research, project concepts, proposed building program, environmental investigation and remediation reports, building systems analysis reports, applicable city/state regulations including health code, and Americans with Disabilities Act compliance.

3.2. Owner’s Representative shall become familiar with, and provide services that are consistent with applicable Laws and the requirements of easements, licenses, and other pertinent agreements to the extent the foregoing are made known to Owner’s Representative that are otherwise not the responsibility of other entities such as the architect/engineer, civil engineer, environmental consultant, etc..

3.3. Owner’s Representative may meet with the Owner and its risk management/insurance consultants to discuss and make recommendations regarding the development and implementation of an effective risk management program for the Project.

3.4. Owner’s Representative shall assist Owner in the compliance with the Owner’s standard contracting protocol, including any women or minority enterprise program applicable to the Project, and similar applicable federal requirements, if any.

3.5. Owner’s Representative shall assist the Owner in selecting, retaining and coordinating the professional services of all design consultants, surveyors, special consultants and testing laboratories required for the Project.

3.6. Owner’s Representative shall consult with and advise the Owner on strategies for the procurement of all required professional services.

3.7. Owner’s Representative shall develop Request for Qualifications and administer consultant selection processes.

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3.8. Owner’s Representative shall assist the Owner’s Legal Counsel in the application of applicable Local and State procurement protocols.

3.9. Owner’s Representative shall assist with the negotiation of professional service contracts.

3.10. Owner’s Representative shall consult with and advise Owner concerning appropriate construction delivery methods, such as separate prime contractors and sequenced bid packages.

**4. Preconstruction Phase: Design and Bidding Services**

4.1. Owner’s Representative shall provide leadership on matters relating to the planning, design, governmental approvals, and other activities necessary to complete the Project.

4.2. Owner’s Representative shall (1) coordinate the preparation by the Architect of a written and graphic description of the program for the Project, including room uses, sizes and adjacency requirements, in accordance with Owner’s goals and objectives (the "Project Program"),(2) prepare and submit to Owner a preliminary estimated schedule for completion of the design and construction of the Project, the various major activities to be undertaken in connection with the Project, and the approximate timing of the commencement and completion of such activities, which Owner’s Representative shall monitor and revise from time to time throughout the Term (the "Project Schedule"); (3) assist Owner in establishing a Project budget based on a preliminary estimate of Project costs, including without limitation Owner’s internal costs, which Owner’s Representative shall update with increased detail as the design of the Project progresses (the "Project Budget"); and (4) manage the Project Schedule and Project Budget to manage cash flow, maximize value, keep the work progressing in a logical manner, and avoid or mitigate interruptions of design and construction.

4.3. Owner’s Representative shall advise and assist the Owner in activities necessary to obtain any and all rights-of-way necessary for development of the Project.

4.4. Owner’s Representative shall assist the Architect in obtaining permits for the Project; coordinate with the various governmental agencies having permit responsibilities for the Project; represent the Owner at meetings of the applicable governmental units; recommend to the Owner appropriate policies

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or decisions to be followed on public matters affecting the Project; direct the Architect to ascertain whether there are any significant building code or other governmental compliance issues; coordinate with the Contractor the obtaining of necessary building permits or other necessary construction approvals for the Project; and advise the Owner as to any material issues noted by the Architect.

4.5. Owner’s Representative shall schedule and attend regular meetings with the Architect related to the development of the design.

4.6. Owner’s Representative shall provide recommendations to the Owner and Architect regarding construction feasibility, value engineering, availability of materials and labor, time requirements for installation and construction, and factors relating to costs, including costs of alternative designs or materials in a manner consistent with the Project Program, Budget and Schedule, and possible cost reductions and economies if and when necessary to reconcile the Project Budget, Program, and Schedule.

4.7. Owner’s Representative shall review and comment on the drawings and specifications for the Project (the "Construction Documents"), as they are prepared by the Architect. Owner’s Representative shall assist the Owner in the evaluation and recommendation of appropriate design alternatives in light of the Owner’s Project Program and the Project Budget and Schedule, provided the Owner’s Representative shall not assume any of the Architect's responsibilities for design or any of the general contractor’s responsibilities for construction means, methods or costs.

4.8. Upon approval by Owner of design development plans and specifications, Owner’s Representative shall (a) lead the process on behalf of the Owner in reviewing and coordinating the preparation by the Architect and other Project consultants of the Construction Documents for the Project; and (b) make recommendations regarding alternative solutions whenever design details appear to (i) adversely affect construction feasibility, the Project Program, Budget or Schedule; or (ii) cause the Project to deviate from the approved drawings or requirements of Owner.

4.9. Owner’s Representative shall (i) prepare and update detailed cost estimates for the estimated Project costs to be incurred by Owner in designing and constructing the Project (the “Project Costs Estimate”). The Project Costs Estimate shall include separate line items for each cost category included

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in the Project cost; with line items for anticipated contracts and subcontracts, and (ii) evaluate pricing for alternative building and engineering systems. In addition, Owner's Representative shall:

4.9.1. Revise such Project Budget from time to time as the design of the Project is finalized, the working drawings are prepared, construction contracts for the Project are negotiated, awarded and executed and shall provide a variance summary with each update, including recommendations on any necessary corrective action for unfavorable variances from the then-current Project Budget.

4.9.2. In consultation with the Architect and Contractor, Owner's Representative shall provide value engineering services to analyze and make recommendations concerning availability of materials and labor, time requirements for installation and construction, and other factors related to costs, including costs of alternative designs or materials, and possible cost reductions and economies. Owner's Representative shall provide value engineering recommendations to Owner, but the final decision will, in every instance, be Owner's decision.

4.9.3. Owner's Representative shall recommend modifications to the Project design, Project Budget, Project Schedule and Project Program to reconcile each with the others, for final decision by Owner;

4.10. Owner's Representative shall assist Owner in setting a final Project Budget, based on the approved design and the Project Schedule, the Project Program, the Project Costs Estimate and financial constraints identified by Owner; if Owner, with the advice of the Owner's Representative, elects to proceed with separate Project construction contracts or separate bid packages, the Project Costs Estimate and final Project Budget shall include a separate budget for each Project construction contract or bid package. When used in this Agreement, depending on its context, the term "bid" shall mean "Qualification" and the term "bidder" shall mean "proposer".

4.11. Owner's Representative shall act as Owner's representative in coordinating and assisting the Architect in the preparation of bid documents. Owner's Representative shall manage the bid process and execution of contracts in accordance with Owner's requirements.

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4.12. If any portions of the work are to be separated into separate bid sections, Owner’s Representative shall review the working drawings and make recommendations to the Architect to (i) coordinate the work of the separate bid portions, (ii) allocate the work to the separate bid portions, (iii) provide the proper coordination for phased construction, and (iv) advise Owner with respect to whether major portions of the work should be bid as separate prime contracts.

4.13. Owner’s Representative shall assist with the design, procurement and coordination of FF&E (Furniture, Fixtures, and Equipment) Information Technology, Security, Audio/Visual, Signage, Testing Services, Temporary Facilities and other Owner Directly Procured building systems.

4.14. Owner’s Representative shall assist with pre-bid conferences to familiarize bidders with the bid documents and any special or unique systems, materials or methods.

4.15. Owner’s Representative shall review bids, prepare analyses and make recommendations to Owner for award of a contract for the Project.

**5. Construction Phase Services**

5.1. Owner Representative shall have the ability to perform construction management services required to manage multiple primes (directly contracted to the Owner) in lieu of a General Contractor.

5.2. Owner’s Representative shall provide recommendations regarding each Contractor’s proposed mobilization schedule, temporary Project facilities, equipment, materials and services during construction and the assignment of responsibilities relating to same.

5.3. Owner’s Representative shall conduct pre-award conferences with the best and lowest respondent for a Project construction contract; advise Owner regarding the negotiation of business terms of each Project construction contract; and advise Owner on the acceptability of Contractor for the Project.

5.4. After Owner awards each Project construction contract and before the Contractor commences work on the site, Owner’s Representative shall assist Owner in the preparation of necessary site logistics plans, traffic flow diagrams and plans for the performance of the applicable work as a result of the

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review and coordination of the contractor’s implementation plan, showing the use of designated roadways or street lights, the closing of any roadways, streets and/or sidewalks, and the re-routing of any traffic; and assist in obtaining necessary government approvals required to implement such traffic plans.

5.5. Owner’s Representative shall represent the Owner in its communications with the Architect, Contractor, and Consultant(s); schedule, attend, and conduct progress meetings, regular on-site meetings to review construction progress and pay requests and to provide appropriate recommendations to the Owner concerning the Owner’s decisions on construction matters, including, where necessary, alternative designs or materials; and coordinate, review and advise the Owner concerning, change orders, submittals, and requests for information.

5.6. Owner’s Representative shall (i) assist and review the processing of change orders, (ii) advise Owner concerning the necessity for, scope of and recommended cost of change orders, and (iii) negotiate, on Owner’s behalf, all change orders with Contractor. The final Project Budget and/or Project Schedule, as applicable, will be revised to reflect approved change orders.

5.7. Owner’s Representative shall review applications for payment by the Architect and Contractor and make written recommendations to Owner concerning payment.

5.8. Owner’s Representative shall direct Contractor (and others, where appropriate) to prepare and update a critical path schedule for completion of the applicable work. In the event of delays impacting the critical path schedule, Owner’s Representative shall make recommendations to Owner for corrective action by Contractor and review Contractor’s recommendations for corrective action.

5.9. Owner’s Representative shall coordinate the Architect’s review and approval of shop drawings, product data and other submittals by Contractor.

5.10. In conjunction with the Contractor who has prime contractual responsibility, the Owner’s Representative shall additionally review and advise the Owner concerning the adequacy of the Contractor’s personnel and equipment, and the availability of materials and supplies to meet the Contractor’s schedules in relation to the Project Schedule.

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5.11. Owner's Representative shall enforce Contractor's contract to maintain a daily log containing the number of workers, equipment, work accomplished, daily weather, problems encountered and other relevant data as the Owner may require. Although Owner's Representative shall not guarantee the performance by Contractor, Owner's Representative shall recommend courses of action to the Owner when Owner or Owner's Representative becomes aware that requirements of any Project construction contract are not being fulfilled, or when Contractor falls behind in its schedule; shall communicate recommendations, as directed by the Owner, to Contractor on behalf of the Owner; shall monitor Contractor's performance of such recommendations; and shall report Contractor's progress to the Owner on at least a monthly basis.

5.12. Owner's Representative shall notify Owner in writing, with photos and supporting documentation, if Owner's Representative becomes aware that the work of Contractor is not being performed in accordance with the requirements of the Contract Documents. As appropriate, Owner's Representative shall have authority, with written authorization from the Owner, to require additional inspection or testing of the work in accordance with the provisions of the Contract Documents, whether or not such work is covered, installed or completed. Owner's Representative shall review any and all test reports and notify the Owner, the Architect and the Contractor, as appropriate, of deficiencies in the work of which Owner's Representative becomes aware and shall advise the Owner of projected consequences of such default and shall make recommendations to Owner with respect thereto. With the written authorization of Owner, Owner's Representative shall reject work which does not conform to the requirements of the applicable Contract Documents.

5.13. Owner's Representative shall advise the Owner concerning the procurement of building materials by Contractor regarding budget and schedule implications.

5.14. Owner's Representative shall attend on-site review of the Project to confirm substantial and final completion of the construction of the Project, and notify Owner when Owner's Representative believes the work under a Project construction contract is substantially complete and that a punchlist should be prepared.

5.15. Owner's Representative shall coordinate with the Architect in its review of the work to enable the Architect to determine the date of substantial completion. At the substantial completion by Contractor

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of the work, monitor the Architect in its inspection of the work and preparation of a detailed “punchlist” specifying any items which require completion, installation, correction or repair. Owner’s Representative will consult with Owner and/or Architect in connection with recommendations for the rejection and replacement of all nonconforming work, as appropriate.

5.16. Owner’s Representative shall obtain from Contractor record drawings or, if required by the applicable Project construction contract, “as-built” drawings, as construction completes.

5.17. Together with the Architect and Owner, Owner’s Representative shall monitor and observe the testing and start-up of all utilities, systems and equipment for the Project and review test reports.

5.18. Owner’s Representative shall complete the final close-out of the Project by (i) obtaining, or causing the Contractor to obtain, government approvals required for the legal use and occupancy of the Project, (ii) obtaining warranties, guarantees, bonds, insurance certificates, installation manuals, and other items required pursuant to the Project construction contracts, (iii) obtaining affidavits, waivers, and releases the Contractors are required to provide pursuant to the Project construction contracts to achieve final completion of the Project, (iv) collecting and/or otherwise resolving any and all back charge claims that Owner may assert against any Architect or Contractors, or (v) representing Owner at meetings and/or inspections scheduled by Owner and held to resolve problems relating to design, physical condition or operation of the Project to seek enforcement of warranties.

**Qualifications Content**

Qualifications must be organized according to the sections listed below. Qualifications should be of sufficient length and detail to demonstrate the proposer has a thorough understanding of the skills necessary to deliver the services requested.

1. General Information

Provide a company profile including principal areas of expertise and experience providing Owner’s Representative services to Publicly Funded entities in the State of Missouri. Include an organizational

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chart depicting the management of the firm's organization and its relationship to any other business entity. Qualifications must include the following information:

- Date, state and type of business organization (close, general, or S corporation; LLC or PLLC; sole proprietorship).
- Federal and state tax ID numbers.
- Names of Owners, Principals and/or Officers.
- The name, title, e-mail address, mailing address, fax and telephone number of the officer authorized to represent the consultant in any correspondence, negotiations and sign any contract that may result.
- The project manager's name, title, e-mail address, mailing address, fax and telephone number.

## 2. Project Understanding & Approach

Describe your understanding of the project and approach to delivering Owner's Representation services. It is important to demonstrate the ability to advocate for the Owner while maintaining professional relationships with the architect and contractors during the project. Most importantly, you must demonstrate the ability to help the Owner make important decisions during the project by collecting and interpreting technical information from the architect and contractor. Qualifications must include the following information:

- Describe how you will organize and perform tasks in each phase of the project.
- Describe how you will manage the project budget, schedule and scope.
- Describe how you will ensure quality control.

## 3. Staffing Proposal

Provide a staffing proposal including a narrative description, organization chart of the proposed team and résumés of key personnel. The firm must demonstrate the ability to provide support for the Project Team in each phase of the project. Proposals must include the following information:

- Identify the key personnel responsible for leading and staffing each phase of the project. Include their percent involvement during each phase of the assignment.
- Key personnel's resumes including name, title, education, experience, references, professional affiliations, certifications, licenses and registrations. Clearly define projects managed by those

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individuals in the role of an Owner Representative (not Architect, Engineer, Contractor or any other role on the project other than an Owner Representative). Clearly define projects managed by those individuals that are similar to our project type in scope of work and purpose. Only include resumes for individuals that will be actively engaged on the project.

- Identify any external sub-consultants and describe their roles and responsibilities with the Project Team.
- Describe the firm's contingency plan to respond with appropriate back-up staff in the case of death, disability, illness or separation.

#### 4. Similar Project Experience & References

Provide a list of related K-12 Project Experience.

Describe the firm's current and recent experience representing Publicly Funded Owners as an Owner Representative or Construction Manager AGENT (not Architect, Engineer, Contractor or any other role on the project other than an Owner Representative). Furthermore, only include data on those projects that included the involvement of at least one key person from your staffing proposal (included herein).

Project Data should include: Client name, brief descriptions of project, date completed, constructed value, the name of the proposed staff that was involved (and their role) and an owner reference including name, title, phone number and e-mail address.

#### 5. Local and State of Missouri Familiarity

Provide information regarding your local experience and understanding of the Missouri State Statues that apply to Design, Construction and Procurement.

#### **Qualifications Submissions**

All pages must be sequentially numbered within each section. An identifiable tab sheet must precede each proposal section. Include a detailed index for easy reference to the proposal.

To be considered, one (1) electronic copy and three (3) hardcopies of the Qualifications must be submitted in sealed envelopes to:

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## **Owner's Representative Services Qualifications**

Miller County R-III School District  
C/O Jason Price, Superintendent  
526 School Road  
Tuscumbia, Missouri 65082

## **RFQ Schedule**

The District reserves the right to delete or modify any part of this schedule.

Monday, December 2<sup>nd</sup>, 2019  
Friday, December 20<sup>th</sup>, 2019 by 3:00PM CST  
Monday, January 16<sup>th</sup>, 2020

Owner distributes and publishes RFQ  
Qualifications due  
Interview date if necessary

## **Questions**

Submit questions to:  
Mr. Jason Price, Superintendent  
526 School Road  
Tuscumbia, Missouri 65082  
jprice@tuscumbialions.k12.mo.us

## **General Terms**

1. Nothing contained here will create any contractual relationship between the Owner and the firm submitting qualifications. Statements contained in the response of the successful firm may become part of the agreement for services.
2. Information received from each firm will become the property of the Owner. Information submitted by the firm cannot be considered confidential unless specifically identified as such by the firm.
3. Owner receives the right to approve all assigned personnel and may require the firm to replace members of the project team as deemed necessary.
4. The owner, Principal, or Corporate Officer of the responding firm shall sign the response to the Request for Qualification attesting that all the information provided is true.

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5. The Owner reserves the right to accept or reject any or all Qualifications, waive any irregularities, and to award the contract to other than the lowest fee firm. No Qualifications may be withdrawn for a period of sixty (60) calendar days following the due date of the Qualification.
6. The Owner is not responsible for any costs incurred by any firm for any work performed relative to the preparation of the Response to this Request for Qualification or subsequent negotiations of a contract for owner representative services.
7. Provide name, address, telephone and fax number, and e-mail address of the firm responding to this Request for Qualification. Please designate a single representative or prime contact through whom the Owner may communicate at the firm.
8. Owner's Representative agrees to indemnify and defend and hold harmless the Owner, together with its employees, agents, architects and engineers, and authorized representatives, from and against any and all losses, suits, actions, legal or administrative proceedings, claims, demands, damages, liabilities, interest, reasonable attorney fees, costs and expenses of whatsoever kind or nature whether arising before or after completion of the work hereunder and in any manner directly or indirectly caused, occasioned or contributed to in whole or in part, by reason of any action, omission, fault or negligence whether active or passive of Owner's Representative, or of anyone acting under its direction or control or on its behalf in connection with or incidents to the performance of this Contract. Owner's Representative's indemnity and hold harmless obligations shall apply to the fullest extent permitted by law.
9. The Owner's Representative shall provide insurance with the coverage stated below:
  - (a) Commercial general liability insurance: Including Death and coverage for Premises, Operations Products and Completed Operations, Contractual Liability, Broad Form Property Damage, Independent Contractors. Such coverage shall apply to Bodily Injury and Property Damage on an "Occurrence Form Basis" with limits of Two Million Dollars (\$2,000,000) for all claims arising out of a single accident or occurrence and One Million Dollars (\$1,000,000) for any one person in a single accident or occurrence.
  - (b) Workers compensation insurance: Statutory coverage per R.S.Mo. 287.010 et seq
  - (c) Automobile Liability Insurance: Covering Death, Bodily Injury and Property Damage for owned, non-owned and hired vehicles with limits of One Million Dollars (\$1,000,000) for all claims arising out of a single accident or occurrence and One Million Dollars (\$1,000,000) for any one person in a single accident or occurrence.
  - (d) Subcontracts: In case any or all of this work is sublet, the Contractor shall require the subcontractor to procure and maintain all insurance required in subparagraphs (a), (b), and (c)

## Board of Education

Steve Wilson President	Debra Rogers Vice President	Gayla Luttrell Secretary	Greg Hawken Member	Louie Gregoire Member	David Grimwood Member	Alisha Cline Member	Weston Ash Member
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526 School Road PO Box 1Tuscumbia, Missouri 65082 573-369-2375



**The Mission of the Miller County R-III School District in partnership with our students, community, parents and teachers is to instill leadership, scholarship, and citizenship in all learners for a shared commitment of excellence.**

Mr. Jason Price  
Superintendent

Mrs. Bobbie Grant  
Principal

Mrs. Mara Wilkerson  
Special Services

here of and in like amounts. Contractor shall require any and all subcontractors with whom it enters into a contract to perform work on this project to protect the District through insurance against applicable hazards or risks and shall provide evidence of such insurance.

(e) Professional liability insurance coverage in the amount of Three Million Dollars (\$3,000,000) for each claim.

All insurance policies shall be primary policies. The policies shall provide that the insurance companies shall notify Owner at least thirty (30) days in advance of the effective date of any modification or termination of the policy. The Owner's Representative shall provide Owner, prior to execution of this Agreement and upon its request from time to time, a certificate or certificates of insurance evidencing the coverage above issued by insurance companies authorized to conduct business under the laws of the State of Missouri.

**Board of Education**

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