



Dave Yost • Auditor of State

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Dave Yost • Auditor of State

Board of Education
Buckeye Valley Local School District
679 Coover Road
Delaware, Ohio 43015

To the Board of Education:

We completed certain procedures over the contracting process at Buckeye Valley Local School District (the District) during the period from July 1, 2014 through June 30, 2015, under the authority of Ohio Revised Code Section 117.11.

Our tests were made in reference to the applicable sections of legislative criteria, as reflected by the Ohio Constitution, Revised Code, regulations, policies, procedures and guidelines of the Auditor of State. The District is responsible for compliance with these laws and regulations.

This report is issued under the authority of the Auditor of State's office to conduct audits in the public interest and includes an explanation of our analysis and work performed as part of this audit.

This engagement is not a financial or performance audit, the objectives of which would be vastly different. Therefore, it is not within the scope of this work to conduct a comprehensive and detailed examination of the District's contracting process.

On October 19, 2015, we held an exit conference with representatives of the District. On October 21, 2015, the District submitted an official response to this report and changes were made to this report as deemed appropriate. The official response can be obtained from Superintendent Andrew Miller at (740) 369-8735.

A handwritten signature in black ink that reads "Dave Yost".

Dave Yost
Auditor of State

October 15, 2015

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Preface

Everyone knows it is increasingly difficult to pass school tax levies. Voters suffer from ballot box fatigue, as school districts feel compelled to return to the community for more money. *The Columbus Dispatch* reported last year only 30% of new school issues passed.

With voters stretched thin, community engagement has become an important aspect of assessing need and communicating pertinent information. However, people are often not familiar with the statutes that apply to campaigns and may not realize when community engagement crosses the line to levy promotion.

This office is aware of many instances where school districts hire building professionals who, in turn, hire subcontractors to handle community engagement. The subcontractor is once removed from the district and consequently less transparent -- seldom coming into the view of taxpayers. In these murky waters, rules can be broken. Therefore, we decided to take this important step to call attention to where the lines are drawn.

This audit is about more than just Buckeye Valley Local Schools. Many other political subdivisions may find themselves in the same or similar situations, so it is important to inform public officials and taxpayers of this potential hazard as they create policy and make decisions. The circumstances identified in this audit illustrate the challenges local elected officials face in navigating election issues.

This report is being released prior to the election, as we routinely release reports, to inform the public. The voters may draw their own conclusions based on the facts provided – but they have a right to know this information.

The Auditor of State has no interest in any local election or its outcome. It has every interest, and duty, to report its findings regarding local governments and their compliance with applicable law.

Background

On September 3, 2014 this office received a complaint regarding the Buckeye Valley Local School District, Delaware County, Ohio (the District). The complaint alleged that public money was being paid to a firm named Aimpoint Research (Aimpoint) who was working to promote an upcoming levy. Knowingly using public monies to help promote a levy campaign would violate Ohio Rev. Code §9.03 *Newsletters of Political Subdivisions* paragraphs (C)(1)(e) and (D) which provide:

(C) Except as otherwise provided in division (A)(7) of section 340.03 of the Revised Code, no governing body of a political subdivision shall use public funds to do any of the following: ...

(1)(e) Supports or opposes the nomination or election of a candidate for public office, the investigation, prosecution, or recall of a public official, or the passage of a levy or bond issue.

...

(D) Except as otherwise provided in division (A)(7) of section 340.03 of the Revised Code or in division (E) of this section, no person shall knowingly conduct a direct or indirect transaction of public funds to the benefit of any of the following:

- (1) A campaign committee;
- (2) A political action committee;
- (3) A legislative campaign fund;
- (4) A political party;
- (5) A campaign fund;
- (6) A political committee;
- (7) A separate segregated fund;
- (8) A candidate.

Additionally, use of public monies to promote a levy campaign by a school district would violate Ohio Rev. Code §3315.07 *Instructional program for employees- supplies and equipment for local school districts* which provides in pertinent part at (C)(1)

...no board of education shall use public funds to support or oppose the passage of a school levy or bond issue or to compensate any school district employee for time spent on any activity intended to influence the outcome of a school levy or bond issue election.

Our interviews identified that in 2013 three new school board members of the Buckeye Valley School Board ("the Board") were elected (out of a total of five seats). Those interviewed stated all three members campaigned on a platform to upgrade existing elementary schools. The Board issued a Request for Proposals (RFP) seeking an architectural firm who would determine the costs for upgrades to existing buildings and determine the size of a bond issuance to propose to voters. A copy of the RFP is attached hereto as appendix A.

Nine firms responded to the RFP and provided written responses to the Board's architectural committee. The committee evaluated and scored the proposals and the top three firms were invited before the full Board for oral presentations. One of those firms was Orchard Hiltz & McCliment, Inc. (d/b/a, OHM Advisors, hereinafter referred to as "OHM").

The firms presented their proposals to the full Board at a meeting on March 5, 2014. The Board then acted on a resolution approving OHM as the District's design professional on March 10, 2014. The District and OHM entered into an Interim Services Agreement (the Agreement) on March 18, 2014.

The Agreement was for OHM to provide basic services related to the possible renovation of three older elementary schools and includes a provision for Aimpoint, a subcontractor of OHM, to provide "community engagement" services relevant to a proposed bond issuance. The total value of the Agreement was \$60,000 and included "\$30,000 for services provided by Aimpoint related to community engagement". The District was invoiced by OHM and paid all monies directly to OHM. When Aimpoint performed work as a subcontractor, invoices were submitted to OHM for payment.

Objective

Auditors and investigators evaluated the work performed by Aimpoint, including what work was actually performed under the Agreement and whether the work performed violated Ohio Rev. Code §9.03 and §3315.07 which include prohibitions against spending public money to promote levies.

Procedures Performed

In order to determine whether the District expended public money in violation of Ohio Rev. Code §9.03 or §3315.07, this office reviewed the Agreement, the Board minutes, activities related to the 2014 campaign, and invoices submitted by Aimpoint. We also interviewed all five District board members, the District's current and past superintendents, the District's treasurer, members of the 2014 levy campaign, officers for the community relations firm referenced in this report, and concerned citizens.

The Interim Services Agreement

We began by reviewing the Interim Services Agreement (the Agreement). A copy of the Agreement is attached hereto as appendix B. First, the parties to the Agreement were the District and OHM Associates. Aimpoint was specifically referenced as a subcontractor for OHM, but was not a signatory of the Agreement.

Paragraph 1.A. Basic Services spelled out the services OHM would provide. There were eight subparagraphs, each of which described how OHM would evaluate existing elementary school facilities and advise the Board regarding a capital improvements program for those elementary schools.

After defining the services, the Agreement included the following language: "Services provided by [OHM] include use of a consultant for community engagement to determine the scope of the project for which funding will be sought through a bond issue."

That consultant was later referenced in para. 3 Compensation for Services. In relevant part, that paragraph states:

The Design Professional [OHM] agrees that services provided during this interim period, before financing is available to proceed with any portion of the Project, will be provided at a not-to-exceed total amount of \$60,000, as described in this Agreement. The cost of the first year services includes \$30,000 for services provided by Aimpoint related to community engagement and other amounts for services provided by the Design Professional [OHM], including its consultants, to assess the existing elementary buildings and to provide programming and preliminary design services for the planned scope of the project. (underlining added)

Aimpoint's specific services were then listed at the end of the Agreement on a page titled "LIST OF COMMUNITY ENGAGEMENT SERVICES TO BY (sic) PROVIDED BY AIMPOINT". The services included the following:

1. Survey of community leaders
2. Telephonic citizen survey
3. Community leader summit
4. Public meetings (2)
5. Tele-town meeting
6. Social media outreach
7. Assistance with media messaging to measure community feelings related to the proposed improvements to elementary school buildings.

The Agreement did not contain an integration clause to integrate the subcontract between OHM and Aimpoint.

Board of Education Architectural Committee

We evaluated what OHM and Aimpoint presented to the architectural committee in response to the RFP. Two District School Board members were members of the Architectural Committee, as was the Superintendent and three community members familiar with the construction business. Of the three firms identified to present before the architectural committee, those interviewed stated all three brought public relations firms with them.

Specific to OHM and Aimpoint's proposal, we were able to obtain the materials provided to the architectural committee. A handout titled "Community Engagement Activities and Bond Issue Campaign" includes the following services OHM and Aimpoint would provide:

Development of a Campaign Platform and Message: In order to pass a bond issue, we must define it early in favorable terms and control the debate throughout the campaign...

Development of the Campaign Strategy and Plan: The development of a clearly defined campaign strategy and plan is critical to the success of our effort. The careful and deliberate integration of campaign tools, resources and manpower allows us to maximize our impact and minimize wasted campaign dollars...

Voter Turnout and Targeting Analysis: Careful analysis of voter registration and turnout trends allows us to identify our target voter base and focus campaign resources to the areas in which they will make the strongest impact.

2014 Campaign

On July 21, 2014, the Board unanimously approved Resolution 15-11 authorizing a bond issuance not to exceed \$26.5 million for the purpose of renovating three elementary schools within the District. We reviewed minutes from public meetings and conducted interviews regarding Aimpoint's actions during the campaign period to see if they complied with Ohio Rev. Code §9.03 and §3315.07.

Minutes from the District's August 18, 2014 facilities meeting indicate the following were present: concerned citizens, Aimpoint's CEO, the chairperson of the We Believe in BV Schools committee, and the District's superintendent. We Believe in BV Schools is a separate entity from the District. According to the Delaware County Board of Elections, We Believe in BV Schools is registered as a ballot issues committee. During the course of the facilities meeting, the topic shifted to passage of the bond issuance and a member of the public inquired whether this was a facilities meeting or a campaign strategy meeting.

The superintendent then responded the facilities meeting was adjourning and would reconvene later. He indicated people were free to leave and that We Believe in BV Schools would be discussing the upcoming bond issuance. Aimpoint's CEO then proceeded to speak about campaign strategy and how to pass the proposed bond issuance. Aimpoint later billed OHM \$2,500 for this meeting as indicated on invoice #49 dated September 3, 2014.

We also reviewed an audio recording of the August 19, 2014 School Board meeting. A community member questioned why Aimpoint was present at the previous day's facilities meeting and used the meeting as an opportunity to discuss a 400-person telephonic survey regarding the proposed levy. A member of the Board replied:

The difference between this survey and the previous one, this one is being conducted at the recommendation of OHM and the communications firm (Aimpoint) that we have contracted with to aid us in passing the bond issue. Um, so, at their recommendation they are happy to do that. **(inaudible)**...these people know what they are doing, we are using them to help us get this passed.

The board member retracted this statement at the subsequent Board meeting. No other board member responded publicly at any time.

As stated above, the Agreement includes that Aimpoint will conduct telephonic citizen surveys. The survey included twenty-seven questions. Those questions ranged from generic, background questions dealing with demographics, including age and sex to more bond-specific questions. A copy of the survey is attached hereto as appendix C.

The survey began by introducing the caller and the statement "I'm calling on behalf of Aimpoint Research, an independent research firm."

Prior to Question 12, the following paragraph appeared:

Thank you. Now let me share a little more information about the upcoming bond issue. I'm going to read a series of statements one at a time. Please tell me whether the statement makes you more or less likely to support the November bond issue to renovate and enhance the elementary schools.

The subsequent statements, found in Questions 13-18, included statements about the cost to homeowners, that older elementary schools would be air-conditioned, and the cost for additional school staffing. Question 19 then asked if the election were held today, would the respondent vote for or against the bond issuance.

Interviews were also conducted by the AOS of the chairperson for the We Believe in BV Schools campaign regarding both the District's relationship with Aimpoint and Aimpoint's relationship with We Believe in BV Schools. As for the District-Aimpoint relationship, the chairperson believed OHM had retained Aimpoint (i.e., not the Board). He stated the District did not instruct We Believe in BV Schools to work with Aimpoint and as far as he knew the District's sole relationship was with OHM. The chairperson was unaware of a separate OHM-Aimpoint contract.

As for Aimpoint's relationship with We Believe in BV Schools, the chairperson stated Aimpoint assisted on the campaign for mailers, signs, and telephone calls. This is reflected in a September 5, 2014 e-mail from We Believe in BV Schools' chairperson to Aimpoint's Director of Business Operations inquiring who should pay for mailings. The Director of Business Operations replied:

It is best if someone from the campaign buys them. If we buy them, it shows up on campaign finance reports. You will need a credit card to buy them and the campaign writes that person a check to reimburse them for campaign expense of yard signs. That can happen in the same day to help someone pay down their credit card if need be...

While Aimpoint never directly invoiced We Believe in BV Schools for services or received any monies from We Believe in BV Schools,¹ the chairperson indicated he thought Aimpoint was helping pass the levy. In fact, We Believe in BV Schools and Aimpoint had regularly-scheduled telephone calls every Wednesday morning, totaling approximately fifteen to twenty hours of work together. When a member of We Believe in BV Schools e-mailed Aimpoint's Director of Business Operations to clarify their respective roles on September 15, 2014, the Director of Business Operations replied the same day:

As you know the original timeline we outlined in the spring was significantly altered when the School Board chose to move forward with a specific proposal and truncate the public engagement phase. We were very specifically instructed ... to stop asking questions about direction. So, I agree, the original process, timeline and tactics are no longer applicable. Now we just have to win the campaign...and that takes resources. (underlining added)

Invoices

As stated above, the Agreement with OHM Associates was not to exceed the total amount \$60,000, with \$30,000 specifically approved for Aimpoint's "community relations" work. Ultimately, Aimpoint only invoiced \$25,000 worth of services. The actual invoices failed to itemize expenses with any detail and were submitted to OHM for round-dollar amounts. The invoices do not state, for example, the number of hours worked or the applicable billable rates.

The invoices break down as follows. Copies are attached hereto as appendix D:

- Invoice #31 issue date 5/4/2014 \$5,000 for "Survey of Community Leaders & Community Leaders Summit facilitation"
- Invoice #41 issue date 7/13/2014 \$3,000 for "Facilities Committee meeting, community web survey, support to BV communications/ newsletter, coordination"
- Invoice #44 issue date 8/7/2014 \$7,250 for "Telephonic Survey Buckeye Valley District voters (1/2 of fee)"
- Invoice #49 issue date 9/3/2014 \$7,250 for "Telephonic Survey of Buckeye Valley Local School District Voters (2 of 2 Final); and \$2,500 for "Facilities Committee preparation (8/18/14), planning and meetings.

On September 10, 2014 Aimpoint e-mailed OHM, stating Aimpoint would not bill for the remaining \$5,000 worth of projects, because those projects could be construed as being campaign-related. Thus, while the Agreement authorized up to \$30,000 in payments to Aimpoint, Aimpoint only received \$25,000.

During our interview with Aimpoint's CEO on May 28, 2015, he provided additional information which was not contained in the Agreement. First, there was a separate contract between OHM and Aimpoint in which OHM would pay Aimpoint an additional fifteen thousand dollars (\$15,000) should the bond levy pass. A copy of the contract was obtained from Aimpoint and is included herein as appendix E. That contract contained the following language:

¹ See below under Invoices for discussion of American Strategies.

Proposed Budget: Community engagement (March-July) \$30,000-Survey of community leaders, telephonic citizen survey, community leader summit, public meeting (2), tele-town hall meeting, social media outreach, and assistance with media messaging. Campaign Support (August-November) Campaign tactics- develop a campaign plan, conduct detailed voter targeting and turnout trend analysis, develop a campaign theme and effective message, coordinate creation of campaign materials, provide training sessions to key volunteers, assist with absentee voter strategies- \$15,000 (win bonus).

The CEO stated, and subsequent interviews of Board members confirmed, that the Board was unaware of the \$15,000 “win bonus.”

We also interviewed Aimpoint’s Director of Business Operations. He stated Aimpoint was in favor of the bond levy issue and wanted the levy to pass. He stated he worked closely with We Believe in BV Schools and provided advice to it on campaign messaging. The Director of Business Operations denied receiving any monies from We Believe in BV Schools for Aimpoint’s work.

During the course of our work, we reviewed two invoices sent to We Believe in BV Schools from an entity titled “American Strategies.” It was determined as part of our review that American Strategies’ shared a phone number with Aimpoint. We also determined that American Strategies’ address was the home address for Aimpoint’s Director of Business Operations and that Aimpoint’s CEO is listed on the Secretary of State’s website as one of American Strategies’ incorporators. Further, while reviewing e-mails between We Believe in BV Schools and Aimpoint, we found the following e-mails which highlight the relationship between Aimpoint and American Strategies: First, Aimpoint’s Director of Business Operations e-mailed We Believe in BV Schools’ chairperson on September 22, 2014 asking:

While we wait on the 1st mailer design, [Aimpoint’s CEO] and I are writing/designing the other three mailers...The print and design cost for all 4 mailers will be \$2,700 which can be paid to American Strategies, LLC.

American Strategies later sent invoices to We Believe in BV Schools on October 6 and 21 for a total of \$3,564.16. The invoices sought reimbursement for robo-calls and designing and printing campaign mailers.

Second, on October 26, 2014 the chairperson for We Believe in BV Schools sent an e-mail to Aimpoint with the subject heading “Flyers for Campaign” and asked:

The company that did our flyers, if they receive a call after our financials are released tomorrow ... will they say the flyers were ordered by Aimpoint or by the campaign. I was wondering if they have a confidentiality agreement with you that states the name released would be the campaign?

Aimpoint’s Director of Business Operations replied by e-mail later that day “American Strategies? They won’t say a thing.”

American Strategies relationship with Aimpoint was disclosed to this office in interviews with key officials at Aimpoint.

Conclusion

The Revised Code unequivocally prohibits the use of public money to promote levies. Ohio Rev. Code §9.03(C)(1) prohibits political subdivisions' governing bodies from using public funds in a manner that:

...

(e) Supports or opposes the nomination or election of a candidate for public office, the investigation, prosecution, or recall of a public official, or the passage of a levy or bond issue.

Ohio Rev. Code §9.03 (D) states:

Except as otherwise provided in division (A)(7) of section 340.03 of the Revised Code or in division (E) of this section, no person shall knowingly conduct a direct or indirect transaction of public funds to the benefit of any of the following:

- (1) A campaign committee;
- (2) A political action committee;
- (3) A legislative campaign fund;
- (4) A political party;
- (5) A campaign fund;
- (6) A political committee;
- (7) A separate segregated fund;
- (8) A candidate.

In addition, Ohio Rev. Code §3315.07(C)(1) states:

Except as otherwise provided in division (C)(2) of this section, no board of education shall use public funds to support or oppose the passage of a school levy or bond issue or to compensate any school district employee for time spent on any activity intended to influence the outcome of a school levy or bond issue election.

Aimpoint's relationship with We Believe in BV Schools was not made public during the levy campaign, but our investigation revealed Aimpoint was in fact receiving public money to promote the levy campaign and that board members knew or should have known this fact. It appears that Aimpoint may have used American Strategies to disguise its relationship with We Believe in BV Schools.

The facts are inconclusive to establish when the Buckeye Valley Local School District Board of Education became aware of Aimpoint's efforts to pass the levy. There is no evidence the Board was aware of the separate contract between OHM Associates and Aimpoint when the Board approved the Interim Services Agreement. The Interim Services Agreement was legal on its face and the services referenced in the Agreement were lawfully reimbursed (e.g., the web survey and community leaders summit). However, at an August 19, 2014 Board meeting, a board member stated that the Board contracted with Aimpoint "to aide us in passing the bond issue." Though the board member retracted this statement at the subsequent board meeting, the board member also was on the architectural committee which received OHM's proposal. Further, a recording of this statement was included in the official minutes which were subsequently approved unanimously by the full Board on September 9, 2014. The statement was not contested by or ever responded to in any way by other Board members, all of whom were present at August 19, 2014 meeting.

Notably, the AOS report does *not* make a finding that the Board violated Ohio Rev. Code §§9.03 or 3315.07 – we recognized that a single member cannot act for the board, and that the knowledge or even intent of a single member cannot be imputed to the member’s colleagues. It is worth noting that the Auditor of State regularly makes determinations of compliance with applicable statutes. Ohio Rev. Code section 117.01(G)(2)(b) defines an audit as including:

- b) The determination by the auditor of state, as required by section 117.11 of the Revised Code, of whether a public office has complied with all the laws, rules, ordinances, or orders pertaining to the public office.

What the board is prohibited from doing itself may not be done through a contract or a subcontract. Under Ohio law, an expenditure of public money contrary to law is subject to a finding for recovery even if the entity was unaware of the law – that is, governmental entities are strictly liable for spending decisions. Accordingly, this report will be forwarded to the Auditor of State’s Central Region for consideration as part of the District’s Fiscal Year 2015 financial audit.

APPENDIX A

PUBLIC ANNOUNCEMENT REQUESTING STATEMENTS OF QUALIFICATIONS

The Board of Education (the "Board") of the Buckeye Valley Local School District, Delaware County, Ohio (the "District") hereby gives notice of its intent to enter into one or more contracts for design services. The Board is considering a capital improvements plan that may include renovations to the existing elementary facilities and other improvements.

The Board invites firms interested in providing design services for this project to submit statements of qualifications and staffing proposals for consideration by the Board. Statements of qualification and staffing proposals will be reviewed and a design firm selected in accordance with Sections 153.65 to 153.71 of the Ohio Revised Code. The Board will select a firm to provide the required services based upon the statements of qualification and staffing proposals received and the availability of the firm determined most qualified to provide the required services by the Board's timelines for completion. This project will not be constructed as part of any OSFC classroom facilities program. The Board has not decided if it will use construction management services for the project. The Board may place a bond issue on the ballot as early as November 2014 to fund the project defined by the Board after the Board has reviewed options with the design firm selected.

Statements of Qualification

Statements of qualifications should include the following:

1. Information regarding the firm's history;
2. Education, technical training, and experience of owners and key personnel;
3. The firm's experience in designing substantially similar projects in Ohio—*i.e.*, construction and renovations to school facilities;
4. The firm's experience with construction management firms;
5. Ability of the firm to staff the Project so that completion of the Project can be accomplished to meet the Owner's needs. To assist the evaluation of the firm's staff and resource availability, include a list of current similar school district projects, including projects for which the firm has submitted statements of qualification and is being considered to provide design services, and the status of each;
6. The firm's equipment and facilities;
7. Past performance as reflected in evaluations of previous and current clients with respect to factors such as control of costs, quality of work, and meeting deadlines. The firm should include a list of similar projects, which the firm has designed during the past five years. Three of these projects should be the firm's most recent projects. The following information should be included for each project:
 - a. Project owner, name of project and location;
 - b. Brief description of the project;
 - c. Year completed or anticipated completion date;
 - d. Construction cost;
 - e. Other relevant information about the project and the firm's services;

- f. Reference contact person and phone number;
8. The firm's past experience with the Board, if any;
9. The firm's past experience with the incorporation of House Bill 264 energy conservation projects in building improvements/renovations.
10. The ability of the individuals identified by the firm who will be responsible for document production and communication with the Owner during the Project to communicate with the Owner;
11. The services provided by the firm in-house (such as civil engineering, mechanical, electrical, interior design, technology, acoustics, etc.) or the consultants used by the firm to provide these design services;
12. The experience of the individuals identified by the firm who will be responsible for the design and construction administration phases of the Project; and
13. Location of the firm's major and any branch offices, with an explanation of the firm's ability to be responsive to the district's needs and to be present during all phases of the project.

Proposal for the Project

In addition to the qualifications and information listed above, the firm's proposal should include the following:

1. Identification of the partner, principal, or owner in charge of the Project and the Project Architect, as well as any other personnel assigned to the Project, together with the education, training, and experience of these individuals, to the extent it has not been provided in the firm's statement of qualifications.
2. Description of the steps the firm will take to coordinate design and work on the Project with the Board with respect to scheduling the Project, maintaining the construction schedule, and close-out of the Project.
3. The firm's practices with respect to site visits and oversight of the Project.
4. Proposed internal timeline for completion of the Project and the various services to be provided by the firm for pre-construction (pre-bond issue, programming, and design), construction, and close-out phases of the Project.
5. Explain the firm's experience, approach and specific expertise in planning for the use of educational technology, as applicable to the Project.
6. Provide specific information on project budget development and the firm's experience with preparation of project estimates over the past 5 years.
7. List a maximum of four (4) specific qualities that set your firm apart from others as it relates to the District's project.

As required by Ohio Revised Code Sections 153.65 through 153.71, firms submitting statements of qualifications and proposals for the available contract will be evaluated and ranked in order of their qualifications. Following this evaluation, the firms determined to be most qualified may be asked to meet with the District's selection committee and present the firm's qualifications and proposals with respect to the Project. Upon the Board's selection of the firm determined to be most qualified to provide the requested design services for the Project, the Board will enter into contract negotiations for the required services.

Design professionals wishing to submit a statement of qualifications and proposal for portions of the Project must do so in writing before 4:00 p.m. on Friday, February 14, 2014. Copies of the statement of qualification and proposal must be submitted to:

Mark Tingley, Superintendent
Buckeye Valley Local School District
679 Coover Road
Delaware, Ohio 43015
Phone: 740-369-8735
Fax: 740-363-7654

Any questions concerning the Project should be directed to Mr. Tingley at the numbers listed above.

APPENDIX B

INTERIM SERVICES AGREEMENT
BETWEEN
THE BUCKEYE VALLEY LOCAL SCHOOL DISTRICT BOARD OF EDUCATION
AND ORCHARD, HILTZ, AND McCLIMENT, INC.

This Interim Services Agreement ("Agreement") between the Buckeye Valley Local School District Board of Education ("Board") and Orchard, Hiltz and McCliment, Inc., doing business as OHM Advisors, ("Design Professional") is entered, effective as of the latest date signed by one of the parties at the end of this Agreement, for the services described in this Agreement.

BACKGROUND INFORMATION

- A. The Board plans improvements to the existing elementary school buildings within the Buckeye Valley Local School District (the "District") and wishes (1) to examine the District's educational program and physical facilities for the elementary school buildings in detail and (2) to define a capital improvements program that will address needs in both educational programming and physical facilities and that will be supported by the community (the "Project").
- B. The Board solicited qualifications and proposals from qualified design professional firms, following the qualification-based selection process outlined in Ohio Revised Code Sections 153.65 through 153.71, and selected Orchard, Hiltz and McCliment Inc. as the firm most qualified to assist the Board in the review and evaluation of the existing programs and elementary school facilities, to work with the Board to develop and prepare a capital improvements program for the District's elementary program with community support, and to serve as the architect of record for the design and construction of the facilities and improvements defined in the capital improvements program for the Project, which services may be covered by one or more agreements.
- C. The Project will not be part of a co-funded Ohio School Facilities Commission classroom facilities program.
- D. The Board anticipates placing an issue on the November 2014 ballot to seek funding for the Project defined based upon the preliminary evaluation, programming, and facilities report prepared by the Design Professional and approved by the Board.

AGREEMENT

- 1. Summary of Services.
 - A. Basic Services to be provided during this period between selection of the Design Professional and before funding is available to proceed with the Project include the following:
 - (1) assessing existing District needs related to elementary school facilities, from the perspectives of both physical facilities and education, at a level which will allow the Design Professional to participate meaningfully in discussions with the School District regarding the condition of existing elementary facilities;
 - (2) meeting with the community and District representatives to determine the types of improvements required to meet the needs of the community and District; the Design Professional will meet with school staff to develop a program for the

District's elementary school facilities and conducting community engagement activities to inform the community about facility options and to measure community responses;

- (3) assisting the Board in formulating proposed elementary school improvements that are acceptable to the community and district to present to the community;
- (4) assisting in the development of a capital improvements program to address elementary school needs and estimated costs (based upon costs per square foot for elementary school buildings used by the Ohio Facilities construction Commission for the area in which the District is located, with adjustments based upon the Design Professional's experience) for the Project acceptable to the Board that can be used to define the Project in the necessary ballot language for the election;
- (6) working with the Board's other consultants, attending pre-election public meetings, and facilitating discussions, acting as advisor to answer questions about the Project plans and costs during the campaign period preceding the election, which is planned to be placed on the ballot initially in November 2014;
- (7) providing information to the Board and its administration, and developing visual communication tools about the proposed Project; and
- (8) managing and coordinating efforts to provide information to the school district and community about the scope of the Project, including working directly with the District's printer to provide graphic designs in electronic format artwork for the printing of flyers, mailings, and posters describing the Project.

Services provided by the Design Professional include use of a consultant for community engagement to determine the scope of the project for which funding will be sought through a bond issue.

- B. Additional Services may be provided upon request, but are outside the scope of this Agreement. Typical additional pre-election/funding services include site surveys, soils investigations, hazardous waste investigations, development of concept design drawings and detailed estimates of cost, renderings (either computer generated or original watercolor), student enrollment projections, and other services not clearly intended to be included in the scope of this Agreement. Additional services will be undertaken only with the prior written approval of the Board. If additional services are requested by the Board, the fee for such services will be negotiated and approved by the Board prior to beginning the services. Compensation for these services may be based on a mutually agreed lump sum, hourly rate, or fee basis. Current hourly rates for the Design Professional are noted on the attached Schedule of Hourly Rates ("Schedule") attached to this Agreement. Services of outside consultants, if any, shall be provided at cost.

2. Term of Agreement. This Agreement shall be effective during the period prior to the election at which financing for the Project is approved by the voters in the community, unless specifically agreed otherwise by the parties. Services provided pursuant to this Agreement will be part of the programming and schematic design phase services required for the complete design required for the Project. The Board may terminate this Agreement at any time by providing written notice to the Design Professional. If the Board elects to proceed with the services of the Design Professional after funding becomes available for the Project, this Agreement shall be superseded and replaced by the form(s) of agreement for architectural

services appropriate for the project delivery method to be used for the Project. The parties anticipate using a modified AIA form of agreement for design services.

3. Compensation for Services. The Design Professional agrees that services provided during this interim period, before financing is available to proceed with any portion of the Project, will be provided at a not-to-exceed total amount of \$60,000, as described in this Agreement. The cost for the first year services includes \$30,000 for services provided by Aimpoint related to community engagement and other amounts for services provided by the Design Professional, including its consultants, to assess the existing elementary buildings and to provide programming and preliminary design services for the planned scope of the Project. This amount will not be exceeded unless approved by the Board and documented with a written amendment to this Agreement. At any time that the Board directs the Design Professional to proceed with more detailed design of improvements identified during the activities conducted through this Agreement, the parties will negotiate the compensation for those services and enter into an agreement for design and construction administration related to those improvements. In no event will any compensation be paid by the Board for pre-election or campaign assistance, except as outlined in this agreement and as outlined in the attached scope of pre-bond issue services.

Notwithstanding the foregoing, the Board recognizes the value of the services that the Design Professional will devote to the Project for the development of the program and assistance with the communication of the scope of the program to staff and community members and agreed as follows:

- (a) The services provided pursuant to this Interim Services Agreement will not exceed the total amount of \$60,000, with the understanding that the Design Professional will track services provided at its standard hourly rates, as well amounts paid to consultants, subject to the following provisions:
 - (1) If the Board terminates this Agreement at any time, the Board will pay the Design Professional for its consulting services a maximum amount of \$60,000 for services provided, based upon the records maintained by the Design Professional identifying the services provided by the Design Professional and its staff and consultants.
 - (2) The Board in its sole discretion may determine to terminate this Agreement for any reason, including because it decides not to proceed with a building program of any type or because it does not wish to continue to use the services of the Design Professional for future improvements. In the event that the Board terminates this Agreement, payment for services provided through the date of termination will be made as described in the preceding item.
 - (3) If the Design Professional terminates this Agreement, the parties agree that the Design Professional shall be paid for services provided up to one-half of the not-to-exceed amount of \$60,000 stated above.
- (b) If the Board determines to proceed with the Project after funding is available, the parties will negotiate an agreement for design and construction administration services; any amounts paid for interim services pursuant to this Agreement will be considered in the compensation negotiated, but the parties acknowledge that full credit for compensation received may not be appropriate based upon the size and scope of the project.

4. Design and Construction of the Project. The parties agree that the following provisions will apply to and be incorporated into the agreement for the design and construction of the Project.

A. Fee for Services. The parties acknowledge that the scope of the improvements to be included in the Project is not known at this time. However, the Design Professional recognizes the Board's wish to define a not-to-exceed fee for services at this time. The parties agree upon the fee for services will be negotiated at the time that the Project scope is defined and funding is available to proceed with the project and that the fee to be incorporated into the replacement agreement shall not exceed the following percentages of construction cost for the Project, without the express agreement of the parties:

New Construction (including additions)	6.5% of construction costs
Renovations to Existing Facilities	7.5% of construction costs
Optional Demolition of Existing Facilities	5.5% of construction costs

These percentage fees are the basis for the amounts included in the budget for OSFC projects as of September 2008, but are not a guarantee that these fees will be appropriate for the scope of the Project or the same amounts in effect at the time the Board is ready to proceed, particularly for renovations to existing facilities. The budgeted design fees described above are based upon the traditional construction manager as agent project delivery method, which is the current delivery method used for co-funded OSFC construction project; the parties acknowledge that Amended House Bill 153 included certain construction reform provisions that provide different project delivery methods for school construction projects.

The Design Professional recognizes and agrees that the Board does not intend to pay Reimbursable Expenses and that the fee for the design and construction of the Project will include all costs of the Design Professional to provide its services. The Board further reserves the right to convert the percentage-based fee to a fixed amount at such time as the design documents are sufficiently detailed to allow an estimate of construction cost to be prepared; the estimate of construction cost shall include a reasonable amount for construction contingencies.

B. Professional Liability Insurance. The Design Professional will provide professional liability insurance, including coverage for errors and omissions, in the amount of \$3,000,000 for each claim and \$5,000,000 aggregate. The Design Professional will provide the Board with a certificate of insurance to evidence such coverage, and the Board will be named as a certificate holder.

Agreed to as of the last date shown below.

BOARD
Buckeye Valley Local School District
Board of Education

DESIGN PROFESSIONAL
Orchard, Hiltz and McCliment, Inc.
d/b/a OHM Advisors

By: Kelly D. Moore

By: 

Name & Title: Kelly O Moore Name & Title: Daniel Obrynba _____
Treasurer
Date: 3/18/14 Date: 3/18/2014

CERTIFICATE of FUNDS
(Section 5705.41, R.C.)

IT IS HEREBY CERTIFIED that the moneys required to meet the obligations of the Buckeye Valley Local School District Board of Education for the first year of services to be provided under the attached Agreement have been lawfully appropriated for such purposes and are in the treasury of the District or are in the process of collection to an appropriate fund, free from any previous encumbrance.

Buckeye Valley Local School District

By: Kelly O Moore
Treasurer
Date: 3/18/14

Attachments:

1. Outline of services provided by the Design Professional's consultant for community outreach pre-bond issue services
2. OHM Advisors' Hourly Rate Schedule

**LIST OF COMMUNITY ENGAGEMENT SERVICES
TO BY PROVIDED BY AIMPOINT**

1. Survey of community leaders
2. Telephonic citizen survey
3. Community leader summit
4. Public meetings (2)
5. Tele-town meeting
6. Social media outreach
7. Assistance with media messaging to measure community feelings related to the proposed improvements to elementary school buildings

APPENDIX C



Buckeye Valley Local School District - Citizen Survey

Field dates: September 4-7, 2014 (Tentative)
Sample: 400 residents of the Buckeye Valley Local School District
+/- 5% Margin of Error with 95% Confidence
Screeners: Confirm location

Hello, my name is _____, and I'm calling on behalf of Aimpoint Research, an independent market research firm. This is not a sales call. We are conducting a confidential survey of Buckeye Valley School District residents and we would like to have your opinion.

- A. Do you currently live in the Buckeye Valley Local School District?
- 1. Yes Continue
 - 2. No Terminate
- B. Are you or is anyone in your household a reporter or member of the media?
- 1. Yes Terminate
 - 2. No Continue
1. Generally speaking, would you say that your community is going in the right direction, or has it gotten off onto the wrong track?
- A. Right direction
 - B. Wrong track
 - C. Don't know
 - D. Refused
2. How would you rate the current state of the local economy? Would you say it is excellent, good, fair, poor, or very poor?
- A. Excellent
 - B. Good
 - C. Fair
 - D. Poor
 - E. Very poor
 - F. Don't know
3. Over the past year or so, would you say that your personal financial situation has gotten better than it was before, stayed about the same or is not as good as it was before?
- A. Better
 - B. Stayed the same
 - C. Not as good
 - D. Don't know



4. Generally speaking, would you say that property taxes in your community are too high, mostly pretty fair or too low?
 - A. Too high
 - B. Pretty fair
 - C. Too low
 - D. Don't know

5. Ok, thank you. Now thinking for a moment about Buckeye Valley Local Schools. If A means excellent, B means good, C means average, D poor and F failing, what letter grade would you give to Buckeye Valley Local Schools overall?
 - A. A
 - B. B
 - C. C
 - D. D
 - E. F
 - F. Don't know

6. And in your opinion is the Buckeye Valley Local School District that serves your community generally going in the right direction, or has it gotten off onto the wrong track?
 - A. Right direction (Proceed to 7A and skip 7B)
 - B. Wrong track (Proceed to 7B)
 - C. Don't know (Skip to Q7)
 - D. Refused (Skip to Q7)

7.
 - A. What is the biggest reason you feel that it is going in the right direction? (open-end)
 - B. What is the biggest reason you feel that it is has gotten off onto the wrong track? (open-end)

8. Overall, how would you rate the job the Buckeye Valley Local School District has done communicating with parents and the public, in order to keep them informed? Would you say it is excellent, good, fair, poor, or very poor?
 - A. Excellent
 - B. Good
 - C. Fair
 - D. Poor
 - E. Very poor
 - F. Don't know

9. Overall, how would you rate the quality of education being provided by the Buckeye Valley Local School District? Would you say it is excellent, good, fair, poor, or very poor?
 - A. Excellent
 - B. Good
 - C. Fair
 - D. Poor



- E. Very poor
- F. Don't know

10. In your opinion, how would you rate the job that the Buckeye Valley Local School District is doing managing and spending its tax dollars? Would you say it is excellent, good, fair, poor or very poor?

- A. Excellent
- B. Good
- C. Fair
- D. Poor
- E. Very poor
- F. Don't know

Thank you. As you may know, the Buckeye Valley School District Board of Education has placed a 2.91 mill bond issue on the ballot this November to renovate and enhance the three existing elementary school buildings known as North, East and West Elementary Schools.

11. If the election were held today, would you vote for or against the bond issue to renovate the three elementary schools? (Not read – press for intensity)

- A. For, definitely
- B. For, probably
- C. Against, probably
- D. Against, definitely
- E. Undecided
- F. Refused

Thank you. Now let me share a little more information about the upcoming bond issue. I'm going to read a series of statements one at a time. Please tell me whether the statement makes you more or less likely to support the November bond issue to renovate and enhance the elementary schools. (press for intensity and rotate 12-16)

12. If approved, the bond issue will provide \$26.5 million dollars for the complete renovation and enhancement of each of the three existing elementary school buildings.

- A. Much more likely to support the bond
- B. Somewhat more likely to support the bond
- C. Somewhat less likely to support the bond
- D. Much less likely to support the bond
- E. Don't know
- F. Refused

13. The bond issue will permit Buckeye Valley Local Schools to return fifth graders back into their respective community elementary school buildings.

14. The bond issue will cost the owner of a \$100,000 home an additional \$8.49 per month in property tax.



15. The newly renovated elementary schools will generate an operational cost savings to the district of \$178,000 per year which includes \$90,000 in utility cost savings and \$88,000 in maintenance/repair cost savings.

16. The bond issue will allow for all three elementary schools to all be air conditioned.

17. The elementary school enhancements will provide students with modern, 21st century learning spaces.

18. The additional cost to staff all three elementary schools will not exceed \$375,000.

Now having learned a little more about the planned renovation of the three elementary schools

19. If the election were held today, would you vote for or against the bond issue to renovate the three elementary schools? (Not read – press for intensity)

- A. For, definitely (Proceed to 21)
- B. For, probably (Ask 20 A and skip 20 B)
- C. Against, probably (Skip to 20B)
- D. Against, definitely (Skip to 20B)
- E. Undecided (Skip to 20B)
- F. Refused (Proceed to 21)

20A. What information would you want to know in order to be more confident in your support of the bond issue?

20B. What would you say is the single biggest reason you oppose the proposal to renovate the three elementary schools?

Thank you, now I just have a few other demographic questions:

21. I would like to read you a list of age groups. Please stop me when I get to the one you are in.

- A. 18-29
- B. 30-44
- C. 45-59
- D. 60 and up

22. Do you have any children currently enrolled in a Buckeye Valley Local School District public school?

- A. Yes (Skip Q24)
- B. No
- C. Don't know (Skip Q24)

23. Do you expect to enroll any children in a Buckeye Valley Local School District public school within the next 5 years?



- A. Yes
- B. No
- C. Don't know

24. Are you currently employed?

- A. Not employed
- B. Less than part-time (under 20 hours)
- C. Part-time (20-35 hours)
- D. Full-time (over 35 hours)
- E. Retired
- F. Don't know

25. How long have you or your family lived in the Buckeye Valley Local School District?

- A. Less than 1 year
- B. 1-5 years
- C. 6-10 years
- D. 11-20 years
- E. Over 20 years
- F. Don't know

26. Gender (Acquired not asked)

27. Likely Voter Status (Acquired from data file)

APPENDIX D

BUCKEYE VALLEY LOCAL SCHOOL DISTRICT

OHM-ADVISORS

NO. 038459

INVOICE	PURCHASE ORDER	TI	FUND	FUNC	OBJ	SPCC	SUBJ	OPU	IL	JOB	AMOUNT
0157365 DESCRIPTION:	2150084 BVL5 PRE-BOND PLANNING	05	004	5300	419	0000	000000	000	00	000	15862.50
											\$15,862.50

DATE: 09/10/2014



BUCKEYE VALLEY LOCAL SCHOOL DISTRICT
 BOARD OF EDUCATION
 679 COOVER ROAD
 DELAWARE, OHIO 43015

THE DELAWARE COUNTY BANK
 DELAWARE, OHIO

038459

56-308
 441

DATE	CHECK NO.	AMOUNT
09/10/2014	038459	\$****15,862.50

Fifteen Thousand Eight Hundred Sixty-Two Dollars and 50/100 Cents

PAY TO THE ORDER OF
 OHM-ADVISORS 006720
 34000 PLYMOUTH RD.
 LIVONIA MI 48150

** VOID * VOID * VOID **

VOID AFTER 90 DAYS
 VOUCHER COPY

**** NOT NEGOTIABLE ****
 TREASURER



BUCKEYE VALLEY LOCAL SCHOOL DISTRICT
 BOARD OF EDUCATION
 679 COOVER ROAD
 DELAWARE, OHIO 43015

OHM-ADVISORS
 34000 PLYMOUTH RD.
 LIVONIA MI 48150

ARCHITECTS. ENGINEERS. PLANNERS.



SEP - 5 2014

Buckeye Valley Local School District
Attn: Kelly Moore, Treasurer
679 Coover Road
Delaware OH 43015

Invoice Date : 8/27/2014
Invoice # : 157365
Project : 6438-14-0010

Project Name : Buckeye Valley Schools - Pre-Bond Planning

*OK TO pay
KPM
9/8/14*

For Professional Services Rendered through: 8/16/2014

Salaries

Fixed Rates Labor	612.50	
	Total Salaries	612.50

Expenses

Regular Expenses	15,250.00	
	Total Expenses	15,250.00

Current Invoice 15,862.50

Project Fee : 60,000.00
Prior Billings: 29,267.00
Total Available : 30,733.00

Total this Invoice 15,862.50

Amount Due This Invoice ** 15,862.50

REMIT TO:

OHM Advisors
34000 PLYMOUTH ROAD
LIVONIA, MICHIGAN 48150

T 734.522.6711
F 734.522.6427

OHM-Advisors.com

ARCHITECTS. ENGINEERS. PLANNERS.



Buckey Valley Local School District
Attn: Kelly Moore, Treasurer
679 Coover Road
Delaware OH 43015

Invoice Date : 8/27/2014
Invoice # : 157365
Project : 6438-14-0010

Fixed Rates Labor

<u>Class / Employee Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Principal			
OBRYNBA, DANIEL	3.50	175.00	612.50
			612.50

Regular Expenses

<u>Vendor Name</u>	<u>Doc Nbr</u>		<u>Cost</u>	<u>Multiplier</u>	<u>Amount</u>
Almpoint Research, LLC	93628	08/02/2014	5,000.00	1.00	5,000.00
	93629	08/02/2014	3,000.00	1.00	3,000.00
	94027	08/16/2014	7,250.00	1.00	7,250.00
			<u>15,250.00</u>		<u>15,250.00</u>
					15,250.00

Labor : 612.50
Expense : 15,250.00

Total Project: 6438140010 -- Buckeye Valley Schools - Pre-Bond Planning 15,862.50

REMIT TO:

OHM Advisors
34000 PLYMOUTH ROAD
LIVONIA, MICHIGAN 48150

T 734.522.6711
F 734.522.6427

OHM-Advisors.com

Aimpoint Research, LLC
 3797 Easton Way
 Columbus, OH 43219

Invoice

Date	Invoice #
5/4/2014	31

Tel: 614.225.6300

Bill To
OHM 4000 Plymouth Road Livonia, MI 48150



Account #	Project	P.O. Number	Terms	Due Date
	Buckeye Valley Local Schools		Net 30	6/3/2014
Item	Description	Qty	Rate	Amount
Consulting	Survey of community leaders & Community Leader Summit facilitation		5,000.00	5,000.00
			Total	\$5,000.00

RECEIVED

MAY 05 2014

ORCHARD, HILTZ & McCLIMENT, INC

COPY

Aimpoint Research, LLC
 3797 Easton Way
 Columbus, OH 43219

Invoice

Tel: 614.225.6300

Date	Invoice #
7/13/2014	41

Bill To
OHM 4000 Plymouth Road Livonia, MI 48150



Account #	Project	P.O. Number	Terms	Due Date
	Buckeye Valley Local Schools		Net 30	8/12/2014
Item	Description	Qty	Rate	Amount
Consulting	Buckeye Valley Facilities Committee meetings, community web-survey, support to BV communications / newsletter, coordination.		3,000.00	3,000.00
			Total	\$3,000.00

RECEIVED

JUL 18 2014

ORCHARD, HILTZ & McCLIMENT, INC

COPY

Aimpoint Research, LLC
 3797 Easton Way
 Columbus, OH 43219

Invoice

Tel: 614.225.6300

Date	Invoice #
8/7/2014	44

Bill To
OHM 4000 Plymouth Road Livonia, MI 48150



Account #	Project	P.O. Number	Terms	Due Date
	Buckeye Valley Local Schools		Due on receipt	8/7/2014
Item	Description	Qty	Rate	Amount
Telephonic Survey	Telephonic Survey of Buckeye Valley School District Voters (1/2 of Fee)		7,250.00	7,250.00
RECEIVED				
AUG 22 2014				
ORCHARD HILTZ & McCLIMENT, INC				
COPY				
Total				\$7,250.00

BUCKEYE VALLEY LOCAL SCHOOL DISTRICT

OHM-ADVISORS

NO. 038679

INVOICE	PURCHASE ORDER	TI	FUND	FUNC	OBJ	SPCC	SUBJ	OPU	IL	JOB	AMOUNT
0157804 DESCRIPTION:	2150084 BVLS PRE-BOND PLANNING	05	004	5300	419	0000	000000	000	00	000	14338.50
											\$14,338.50

DATE: 10/06/2014



BUCKEYE VALLEY LOCAL SCHOOL DISTRICT
 BOARD OF EDUCATION
 679 COOVER ROAD
 DELAWARE, OHIO 43015

THE DELAWARE COUNTY BANK
 DELAWARE, OHIO

TAC DEB BARGO 5416290 130627 0210 56-100/2014 17 50 35 038679 14338.50

038679

58-308
441

DATE	CHECK NO.	AMOUNT
10/06/2014	038679	\$****14,338.50

Fourteen Thousand Three Hundred Thirty-Eight Dollars and 50/100 Cents

PAY TO THE ORDER OF
 OHM-ADVISORS 006720
 34000 PLYMOUTH RD.
 LIVONIA MI 48150

**** VOID * VOID * VOID ****

VOID AFTER 90 DAYS
 VOUCHER COPY

****** NOT NEGOTIABLE ******
 TREASURER



BUCKEYE VALLEY LOCAL SCHOOL DISTRICT
 BOARD OF EDUCATION
 679 COOVER ROAD
 DELAWARE, OHIO 43015

OHM-ADVISORS
 34000 PLYMOUTH RD.
 LIVONIA MI 48150

ARCHITECTS. ENGINEERS. PLANNERS.



Buckeye Valley Local School District
Attn: Kelly Moore, Treasurer
679 Coover Road
Delaware OH 43015

*OK to pay
KOM
10/3/14*

Invoice Date : 9/29/2014
Invoice # : 157804
Project : 6438-14-0010

OCT - 3 2014

Project Name : Buckeye Valley Schools - Pre-Bond Planning

For Professional Services Rendered through: 9/13/2014

Salaries

Fixed Rates Labor	4,588.50	
Total Salaries		4,588.50

Expenses

Regular Expenses	9,750.00	
Total Expenses		9,750.00

Current Invoice 14,338.50

Project Fee : 60,000.00
Prior Billings: 45,129.50
Total Available : 14,870.50

Total this Invoice 14,338.50

Amount Due This Invoice ** 14,338.50

REMIT TO:

OHM Advisors
34000 PLYMOUTH ROAD
LIVONIA, MICHIGAN 48150

T 734.522.6711
F 734.522.6427

OHM-Advisors.com

ARCHITECTS. ENGINEERS. PLANNERS.



Buckeye Valley Local School District

Invoice Date : 9/29/2014

Attn: Kelly Moore, Treasurer
679 Coover Road
Delaware OH 43015

Invoice # : 157804
Project : 6438-14-0010

Fixed Rates Labor

<u>Class / Employee Name</u>	<u>Hours</u>	<u>Rate</u>	<u>Amount</u>
Administrative Support			
ALLSOP, MEGHAN	2.00	54.00	108.00
Grad. Arch./Landscape Arch. III			
LUTZ, BRODE	14.00	105.00	1,470.00
Principal			
OBRYNBA, DANIEL	13.50	175.00	2,362.50
Professional Engineer/Architect I			
RETTIG, DANA	6.00	108.00	648.00
Rate Schedule Labor			4,588.50

Regular Expenses

<u>Vendor Name</u>	<u>Doc Nbr</u>	<u>Cost</u>	<u>Multiplier</u>	<u>Amount</u>	
Aimpoint Research, LLC	94584	09/13/2014	9,750.00	1.00	9,750.00
Regular Expenses					9,750.00

Labor : 4,588.50
Expense : 9,750.00

Total Project: 6438140010 -- Buckeye Valley Schools - Pre-Bond Planning **14,338.50**

REMIT TO:

OHM Advisors
34000 PLYMOUTH ROAD
LIVONIA, MICHIGAN 48150

T 734.522.6711
F 734.522.6427

OHM-Advisors.com

D-9

Aimpoint Research, LLC
 3797 Easton Way
 Columbus, OH 43219

Invoice

Date	Invoice #
9/3/2014	49

Tel: 614.225.6300

Bill To
OHM 4000 Plymouth Road Livonia, MI 48150



Account #	Project	P.O. Number	Terms	Due Date
	Buckeye Valley Local Schools		Due on receipt	9/3/2014
Item	Description	Qty	Rate	Amount
Telephonic Survey	Telephonic Survey of Buckeye Valley School District Voters (2 of 2 - Final)		7,250.00	7,250.00
Consulting	Facilities Committee preparation (8/18/14), planning and meetings.		2,500.00	2,500.00
Total invoiced: \$25,000 of \$30000				
RECEIVED SEP 10 2014 ORCHARD, HILTZ & McCLIMENT, INC				
Total				\$9,750.00

COPY

APPENDIX E



Proposed Budget

Community Engagement (March - July) \$30,000

- Survey of community leaders
- Telephonic citizen survey
- Community leader summit
- Public meetings (2)
- Tele-town hall meeting
- Social media outreach
- Assistance with media messaging

Campaign Support (August - November) \$15,000 (win bonus)

Campaign tactics

- Develop a campaign plan
- Conduct detailed voter targeting and turnout trend analysis
- Develop a campaign theme and effective message
- Coordinate creation of campaign materials
- Provide training sessions to key volunteers
- Assist with absentee voter strategies

E-1

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Dave Yost • Auditor of State

BUCKEYE VALLEY LOCAL SCHOOL DISTRICT

DELAWARE COUNTY

CLERK'S CERTIFICATION

This is a true and correct copy of the report which is required to be filed in the Office of the Auditor of State pursuant to Section 117.26, Revised Code, and which is filed in Columbus, Ohio.

Susan Babbitt

CLERK OF THE BUREAU

**CERTIFIED
OCTOBER 22, 2015**