

June 2, 2025

Tim Gropp
Town Manager
Town of McCordsville
6280 W CR 800
McCordsville, IN 46055

Re: Owner's Representative Services
North Community Center Building
2024-207.CCN

Dear Tim:

We are pleased to submit this Letter of Agreement for Owner's Representative services for the North Community Center Building project.

By this Letter and subject to the terms and conditions contained herein, the Town of McCordsville, (Owner) authorizes Waypoint Strategies, Inc., (Waypoint Strategies) to undertake the Services as described in this Letter.

Direction will be provided by Tim Gropp.

SCOPE OF THE PROJECT

The Town of McCordsville is currently renovating the former Volunteer Fire Department building into a community center and has purchased the property to north. The property contains a structure that will be renovated to house town artifacts for public display and provide storage to the Parks Department.

SCOPE OF THE SERVICES

PROJECT DEFINITION AND GOAL SETTING

Scope and Objectives: Define project scope, objectives, timeline, and budget.

Stakeholder Management: Identify and communicate with key stakeholders to ensure alignment and support.

BUDGET AND FINANCIAL PLANNING

Initial Budgeting: Estimate costs related to land acquisition, design, permits, and construction.

Funding Strategy: Explore financing options and create cash flow projections to ensure financial feasibility.

PERMITTING AND ENTITLEMENTS

Permit Acquisition Strategy: Develop a plan to secure necessary permits and navigate regulatory requirements.

Community Engagement: Manage public approvals and address community concerns effectively.

WAYPOINT STRATEGIES

**A DIVISION OF
SCHMIDT ASSOCIATES**

LOCATIONS

415 MASSACHUSETTS AVENUE
INDIANAPOLIS, IN 46204
317.263.6226

PRINCIPALS

SARAH HEMPSTEAD, AIA, LEED AP
KEVIN SHELLEY, AIA, LEED AP
BRETT QUANDT, CDA
LISA GOMPERTS, FAIA, LEED AP
ANNA MARIE BURRELL, AIA, RID
KYLE MILLER, PE, LEED AP
STEVE SCHAECHER, AIA, LEED AP
BEN BAIN, CPSM
ERIC BROEMEL, PE, CEM
JOHN ROBERTSON, AIA, AICHE

WAYPOINT-STRAT.COM



Letter to Tim Gropp
North Community Center Building
June 2, 2025
Page 2

PROCUREMENT AND CONTRACTING STRATEGY

Procurement Planning: Decide on project delivery methods and prequalify contractors.

Contract Management: Develop RFPs, evaluate proposals, and negotiate favorable contracts.

SCHEDULE DEVELOPMENT

Master Scheduling: Create and manage a detailed pre-construction timeline to track key milestones and deadlines.

RISK MANAGEMENT

Risk Identification and Mitigation: Recognize potential challenges and establish contingency plans to address them.

REPORTING AND COMMUNICATION

Regular Updates: Provide consistent status reports and facilitate meetings to keep all stakeholders informed.

CONSTRUCTION MANAGEMENT

Coordination: Day-to-day coordination with construction manager, vendors, and contractors, ensuring project delivery and overall schedule adherence

Change Requests: Manage all change requests, evaluating their impact on time, cost and quality, and negotiating the best outcomes.

DOCUMENTATION & RECORD KEEPING

Record Maintenance: Maintain records for all contracts, invoices, change orders, meetings, communications, and other vital project documents.

STAKEHOLDER MANAGEMENT

Stakeholder Engagement: Serve as the conduit between project stakeholders including architects, contractors, subcontractors, local authorities and the Town.

Project Alignment: Facilitate meetings, resolve issues, and ensure all parties are aligned with the project goals.

Display Signage: Assist with the creation and implementation of display signage for the various components determined by the town to go into this space.

PROJECT CLOSEOUT

Project Hand-off: Ensure smooth project handover, including punch lists, final inspections, and occupancy.

OPTIONAL ADDITIONAL SCOPE OF THE SERVICES

These optional additional services will compliment base services and will be an extension of work being completed at the new police station, providing consistency amongst buildings and processes.



Letter to Tim Gropp
North Community Center Building
June 2, 2025
Page 3

PRE-OCCUPANCY

Post-construction preparation of facilities for management by the town, including necessary code and safety compliance materials, maintenance contracts, warranty follow-ups, security measures, etc.

ASSET INVENTORY

Creation of asset inventories to support efficient maintenance materials purchasing and long-term management of assets

DOCUMENTATION

Documentation of routine and preventative maintenance procedures for each asset.

DELIVERABLES

The following deliverables represent Waypoint Strategies' commitments throughout each Phase and at project close-out. The deliverables for the optional additional services are also included.

Primary Scope:

- Weekly written project updates.
- Monthly detailed budget and schedule updates, including documentation associated with change requests.
- Coordination of OAC meetings throughout the project, to include Town leadership, as needed.
- Quarterly written updates for McCordsville Town Leadership.
- Ongoing communication and coordination with project stakeholders, including Town personnel and the AEC team.
- Additional project communications, as needed or requested.

Optional Additional Services:

- Pre-occupancy, post-construction preparation of facilities for management by the town, including necessary code and safety compliance materials, maintenance contracts, warranty follow-ups, security measures, etc.
- Creation of asset inventories to support efficient maintenance materials purchasing and long-term management of assets.
- Documentation of routine and preventative maintenance procedures for each asset.

SCHEDULE OF ACTIVITIES

This preliminary schedule was created based upon an initial project document. It is understood that schedule is subject to change based upon updated information and coordination with other project stakeholders.



Letter to Tim Gropp
North Community Center Building
June 2, 2025
Page 4

- Project Scoping & Preliminary Design: June - July 2025
- Design, Design Review & Pre-Construction: August – November 2025
- Contractor Procurement: December 2025
- Construction Documents & Final Estimating: January - February 2026
- Bidding & Contracting: March 2026
- Construction: April – September 2026
- Project Close Out: October 2026
- Optional Additional Scope: November - December 2026

OWNER-PROVIDED ITEMS

Owner will provide access to all available building and construction plans, specifications, materials information, and construction project close-out documents. Owner will also provide access to appropriate personnel and the building to complete the project.

ASSUMPTIONS/CLARIFICATIONS

Information furnished by others is assumed to be true, correct, and reliable. A reasonable effort has been made to verify such information; however, Waypoint Strategies assumes no responsibility for its accuracy.

New information or unforeseen conditions that require services beyond those indicated in this Letter will be identified as Additional Services and may be subject to an adjustment in the schedule and/or fee. Written authorization from the Owner is required prior to performing any Additional Services.

FEE AND PAYMENT

The fee is based upon the current schedule, as outlined above. The fee will be a fixed amount, billed monthly per project/phase, as noted in the chart below. Additional services requested by the Owner will be billed according to Waypoint Strategies' current Hourly Rate Schedule.

Phase 1: Town Hall Renovation

The fee outlined below will be billed by the phases outlined below. Each phase will bill monthly based upon % complete as supported by the documentation from architecture and contractor partners on the project.

Phase	Timeline	Fee
Project Scoping, Design, Pre-Construction, Contractor Procurement	June 2025 – December 2025 (8 months)	\$8,000



Letter to Tim Gropp
North Community Center Building
June 2, 2025
Page 5

Construction Documents, Final Estimates, Bidding	January – March 2026 (3 months)	\$4,000
Construction & Project Close Out	April – October 2026 (7 months)	\$8,000
Optional Additional Scope	November – December 2026	\$2,000
Total Fee		\$22,000

Reimbursed expenses include mileage, printing, and Owner authorized costs related to travel, testing and/or permitting. Reimbursed expenses will be billed at cost times 1.10, estimated to be less than \$250 per month.

The fee will be billed monthly. Payments are due and payable thirty (30) days from the date of the invoice. Amounts unpaid thirty (45) days after the invoice date shall bear interest at the rate of 1.5% per month.

ADDITIONAL TERMS

Waypoint Strategies is not responsible for any loss, damage or liability arising from negligent acts by any persons or companies other than employees or consultants of Waypoint Strategies. It is agreed that any liability of Waypoint Strategies is limited to the amount of the fee. Further, Waypoint Strategies' responsibility and liability is limited to the Owner.

The use by third parties of documents and electronic data prepared as a part of this Agreement without the knowledge and consent of Waypoint Strategies shall be at the risk of the Owner and/or the third parties.

If the Owner cancels this Agreement, the Owner agrees to pay Waypoint Strategies upon notice of cancellation for any time or costs incurred before receipt of said notice. Should either party of this Agreement institute legal proceedings because of alleged failure to perform in accordance with its terms, the party against whom judgment is rendered shall pay for all costs, both legal and otherwise, incurred by the other during said action.

Please indicate your acceptance of the terms and conditions of this Letter by signing and returning one copy of this Agreement. Receipt of the executed Letter will serve as our authorization to proceed with the Work. Also enclosed is the Indiana Department of Revenue General Sales Tax Exemption Certificate which should be filled out and if tax exempt, the appropriate reason code should be checked. Please return this form with the executed Letter of Agreement.



Letter to Tim Gropp
North Community Center Building
June 2, 2025
Page 6

Thank you for this opportunity to be of service.

Sincerely,

WAYPOINT STRATEGIES

A Division of Schmidt Associates

A handwritten signature in black ink, reading 'Audra Blasdel'.

Audra Blasdel
Division Lead/Project Manager
ablasdel@waypoint-strat.com

A handwritten signature in black ink, reading 'Sarah Hempstead'.

Sarah Hempstead, AIA, LEED AP
Chief Executive Officer / Principal
shempstead@schmidt-arch.com

Accepted:

(Signature)

(Date)

(Printed name and title)



SCHMIDT
ASSOCIATES

Hourly Rate Schedule

CEO – Principal / COO – Principal	\$350.00
Principal-In-Charge	\$300.00
Project Manager – Principal	\$280.00
Energy and Optimization Service Manager - Associate	\$265.00
Project Manager – Associate / Client Liaison	\$265.00
Sr. Project Architect – Principal	\$265.00
Project Delivery Systems Manager	\$250.00
Sr. Project Architect - Associate / Sr. Engineer - Associate	\$230.00
Design Architect / Design Landscape Architect	\$270.00
Sr. Project Architect / Sr. Engineer	\$220.00
Energy Engineer / Project Manager / Project Coordinator	\$215.00
BIM Specialist / Sr. Engineering Designer - Associate	\$210.00
Sr. Construction Administration / Field Manager	\$200.00
Sr. Engineering Designer / Technology Specialist / Associate	\$200.00
Engineer / Project Architect	\$180.00
Graphic Visualization Specialist	\$180.00
Sr. Landscape Architect / Manager	\$180.00
Urban Planner / LEED® Administrator	\$180.00
Sr. Engineering Designer / Controls Systems Specialist	\$180.00
Tech Resources Specialist / Sr. Interior Designer	\$175.00
Permitting Coordinator	\$165.00
Architect / BIM Designer / Technology Designer / CA	\$150.00
Landscape Architect	\$145.00
Sr. Architectural Graduate / Civil Designer	\$145.00
Interior Designer / Engineering Designer	\$145.00
Sr. Administrative / BIM Coordinator	\$140.00
Graduate Architect / Graduate Engineer	\$130.00
BIM Technician	\$125.00
Graduate Interior Designer / Administrative	\$120.00
Graduate Landscape Architect / Digital Media Specialist	\$120.00
Office Support	\$110.00
Interns	\$75.00

**BETTER FORESIGHT.
BETTER INSIGHT.
BETTER ON-SITE.**

LOCATIONS

415 MASSACHUSETTS AVENUE
INDIANAPOLIS, IN 46204
317.263.6226

731 BRENT STREET, SUITE 203
LOUISVILLE, KY 40204
502.581.0042

PRINCIPALS

SARAH HEMPSTEAD, AIA, LEED AP
KEVIN SHELLEY, AIA, LEED AP
BRETT QUANDT, CDA
LISA GOMPERTS, FAIA, LEED AP
ANNA MARIE BURRELL, AIA, RID
KYLE MILLER, PE, LEED AP
STEVE SCHAECHER, AIA, LEED AP
BEN BAIN, CPSM
ERIC BROEMEL, PE, CEM
JOHN ROBERTSON, AIA, ACHE

SCHMIDT-ARCH.COM

Hourly rates include payroll expenses, taxes, insurance, overhead and profit, and local telephone. Staffing and equipment selection is at the discretion of Schmidt Associates, Inc.

Confidential - not for unauthorized distribution.

Rates Effective 2/22/2024

Form ST-105

State Form 49065 R4/ 8-05

Indiana Department of Revenue
General Sales Tax Exemption Certificate

Indiana registered retail merchants and businesses located outside Indiana may use this certificate. The claimed exemption must be allowed by Indiana code. Exemption statutes of other states are not valid for purchases from Indiana vendors. **This exemption certificate can not be issued for the purchase of Utilities, Vehicles, Watercraft, or Aircraft.** Purchaser must be registered with the Department of Revenue or the appropriate taxing authority of the purchaser's state of residence.

Sales tax must be charged unless all information in each section is fully completed by the purchaser. Purchasers not able to provide all required information must pay the tax and may file a claim for refund (Form GA-110L) directly with the Department of Revenue.

Section 1 (print only)	Name of Purchaser _____		
	Business Address _____ City _____ State _____ Zip _____		
	Purchaser must provide minimum of one ID number below.*		
	Provide your Indiana Registered Retail Merchant's Certificate TID and LOC Number as shown on your Certificate.....		
	TID# (10 digits)	—	LOC# (3 digits)
Section 2	If not registered with the Indiana DOR, provide your State Tax ID Number from another State.....		
	State ID#	State of Issue	
	*See instructions on the reverse side if you do not have either number.		

Section 2	Is this a <input type="checkbox"/> blanket purchase exemption request or a <input type="checkbox"/> single purchase exemption request? (check one)	
	Description of items to be purchased. _____	

Section 3	Purchaser must indicate the type of exemption being claimed for this purchase. (check one or explain)	
	<input type="checkbox"/> Sales to a retailer, wholesaler, or manufacturer for resale only.	
	<input type="checkbox"/> Sale of manufacturing machinery, tools, and equipment to be used directly in direct production .	
	<input type="checkbox"/> Sales to nonprofit organizations claiming exemption pursuant to Sales Tax Information Bulletin #10. (May not be used for personal hotel rooms and meals.)	
	<input type="checkbox"/> Sales of tangible personal property predominately used (greater than 50 percent) in providing public transportation - provide USDOT#. A person or corporation who is hauling under someone else's motor carrier authority, or has a contract as a school bus operator , must provide their SS# or FID# in lieu of a State ID# in Section #1. USDOT# _____	
	<input type="checkbox"/> Sales to persons, occupationally engaged as farmers, to be used directly in production of agricultural products for sale. Note: A farmer not possessing a State Business License# may enter a FID# or a SS# in lieu of a State ID# in Section #1.	
	<input type="checkbox"/> Sales to a contractor for exempt projects (such as public schools, government, or nonprofits).	
	<input type="checkbox"/> Sales to Indiana Governmental Units (agencies, cities, towns, municipalities, public schools, and state universities).	
Section 3	<input type="checkbox"/> Sales to the United States Federal Government - show agency name. _____ Note: A U.S. Government agency should enter its Federal Identification Number (FID#) in Section #1 in lieu of a State ID#.	
	<input type="checkbox"/> Other - explain. _____	

Section 4	I hereby certify under the penalties of perjury that the property purchased by the use of this exemption certificate is to be used for an exempt purpose pursuant to the State Gross Retail Sales Tax Act, Indiana Code 6-2.5, and the item purchased is not a utility, vehicle, watercraft, or aircraft.	
	I confirm my understanding that misuse, (<i>either negligent or intentional</i>), and/or fraudulent use of this certificate may subject both me personally and/or the business entity I represent to the imposition of tax, interest, and civil and/or criminal penalties.	
	Signature of Purchaser _____	Date _____
Section 4	Printed Name _____	Title _____

The Indiana Department of Revenue may request verification of registration in another state if you are an out-of-state purchaser.

Seller must keep this certificate on file to support exempt sales.

Form ST-105
General Information and Instructions

All four (4) sections of the ST-105 must be completed or the exemption is not valid and the seller is responsible for the collection of the Indiana sales tax.

Section 1 Instructions

- A) **This section requires an identification number.** In most cases this number will be an Indiana Department of Revenue issued Taxpayer Identification Number (TID# - see note below) used for Indiana sales and/or withholding tax reporting. If the purchaser is from another state and does not possess an Indiana TID#, a resident state's business license, or State issued ID# must be provided.
- B) **Exceptions** - For a purchaser not possessing either an Indiana TID# or another State ID#, the following may be used in lieu of this requirement.
- Federal Government** – place your FID# in the State ID# space.
- Farmer** – place your SS# or FID# in the State ID# space.
- Public transportation haulers** operating under another motor carrier authority, or with a contract as a school bus operator, must indicate their SS# or FID# in the State ID# space.
- Nonprofit Organization** – must show its FID# in the State ID# space.

Section 2 Instructions

- A) Check a box to indicate if this is a single purchase or blanket exemption.
- B) Describe product being purchased.

Section 3 Instructions

- A) Purchaser must check the reason for exemption.
- B) Purchaser must be able to provide additional information if requested.

Section 4 Instructions

- A) Purchaser must sign and date the form.
- B) Printed name and title of signer must be shown.

Note: The Indiana Taxpayer Identification Number (TID#) is a ten (10) digit number followed by a three (3) digit LOC#. The TID# is also known as the following:

- a) Registered Retail Merchant Certificate
- b) Tax Exempt Identification Number
- c) Sales Tax Identification Number
- d) Withholding Tax Identification Number

The Registered Retail Merchant Certificate issued by the Indiana Department of Revenue shows the TID# (10 digits) and the LOC# (3 digits) at the top right of the certificate.