

## ATTACHMENT A to MASTER ROSTER RFQ

### SAMPLE TASKS OF SCOPE OF SERVICES, DUTIES and RESPONSIBILITIES For OWNER'S PROJECT REPRESENTATIVE

#### GENERAL DESCRIPTION

1. Project Management: On behalf of the State of Minnesota, through its Department of Administration's Real Estate and Construction Services, the Owner's Project Representative (OPR) will be responsible for assisting the State's Project Manager (PM) in the management and delivery of construction projects. Under supervision of the State's PM, the OPR will perform and/or coordinate the activities related to the development and delivery of State projects. For the Master Roster, these duties will vary depending upon complexity and scope of the project.
2. General responsibilities and services: The OPR shall provide the detailed services, duties and responsibilities, described in paragraphs 4 through 43 below, and integrate those into the following General responsibilities:
  - a. Project Management: Provide input to establish and subsequently monitor the project cost, scope and schedule including critical path and definition of project milestone dates.
  - b. Communications Plan: The OPR shall prepare a communication plan to keep stakeholders and project team members informed on the status of the project.
  - c. Project Reporting: Prepare a Project Management Plan and update on a monthly basis to reflect the current project status. (The report is to be in the format of the Project Management Plan described under Project Management Plan below).
  - d. Attend Project Meetings (during design, construction, and post construction phases of the project) and review meeting notes for compliance to project goals.
  - e. Prepare RFPs, contracts, amendments and miscellaneous correspondence for the State PM's or other State official's signature.
3. Resources: The OPR will provide sufficient resources and management skills to carry out the requirements of its contract with the State in an expeditious and economical manner consistent with the interests of the State. The State will provide necessary office supplies, phone, and a work area for the OPR.
4. Detailed Duties of the OPR: The following is a detailed description of the OPR's duties and responsibilities:

#### OWNER//USER AGENCY COORDINATION

5. Project Manager: State will establish a Project Manager (PM) for the Project. The OPR will interface with the PM on all activities related to the Project. All cost, scope, program and schedule changes must be approved by the PM in writing.

6. Owner's Group: State will establish an Owner's Group (OG) including representatives from the Departments of Administration, user agency and other state representatives as determined by State. The OPR will participate in OG meetings for the purpose of monitoring and reporting on the status of the cost, scope and schedule of the project.
7. Project Reporting: The OPR is responsible to report (in bound report) the monthly/biweekly/weekly progress, project costs to date, milestones accomplished, next months scheduled progress, change and cash flow.

### **STATE'S CONSULTANTS**

8. OPR's Responsibilities related to State's Consultants: Under supervision of the State's PM, the OPR will monitor the State's Consultants in performing their work in order to achieve compliance with the project cost, scope and schedule. The OPR will recommend courses of action to the State's PM when requirements of the Project are not being fulfilled.
9. Scheduling: The OPR will advise the State's Consultants of the requirement for performing their work within the framework of the Project Schedule and will monitor the progress of the work being performed by the State Consultants. The OPR will advise and make recommendations to the State's PM concerning alternative courses of action that the PM may take in its efforts to achieve completion of all activities, tasks, actions and deliverables.
10. Contracts and Request for Proposals: The OPR will assist the State's PM in preparation of request for proposals (RFPs), design contracts, and amendments. The OPR will review proposals and make recommendations to the PM of the proposal offering the best value to the State. The OPR will assist the PM in negotiations with selected responders.

### **PROJECT MANAGEMENT**

11. Project Management Plan: The OPR will prepare a Project Management Plan for the State's PM and OG and presented to the State's PM for approval. The OPR will update the Project Management Plan as additional information becomes available. All updates to the Project Management will be submitted to the State's PM for approval and subsequently distributed to each member of the OG. The Project Management Plan shall include, but not be limited to, the following:
  - A. Executive Summary: Include a brief Project Description and overview of the Project including history, purpose, cost, scope (sf areas) and schedule.
  - B. State's Project Team Membership/Organization: The State's Project Team will be defined to include the OPR, OG, PM, Executive Team, State's Consultants and others as necessary. Include organization chart(s) for the Project Team and team members and a project directory. Include a contracting plan describing the proposed State's Consultants. All key members of the Project Team will remain in such person's identified capacity until Final Completion unless otherwise agreed to in writing by the PM.

- C. State's Project Team Communications: Describe the interrelationships of the members of the State's Project Team including the communication flows among the parties.
  - D. Critical Path List: The OPR shall maintain, track and report on a list of critical path items that need to be resolved in order to maintain the project cost and schedule. This list shall show completion dates of when the critical path item was initiated and completed.
  - E. Scope: The OPR shall maintain, monitor and report on changes to the scope of the project including their impact on the budget and schedule.
  - F. Schedule: The OPR shall monitor and report on changes to the project schedule. Include an updated schedule of the entire project with all milestone dates, in each report.
  - G. Cost: The OPR shall monitor and report on changes to the entire project budget. Maintain a budget spreadsheet for the project (in Excel format). Provide an updated budget spreadsheet in each report.
  - H. Quality Control and Quality Assurance: Review consultant's work for compliance with the State's *Design Guidelines*.
  - I. Claims: The OPR shall include a list of all consultant and contractor claims in the report and update the status as it occurs. The OPR will review the contents of any claim submitted to the State, assemble information concerning the claim, review the alleged cause of the claim, and make recommendations to the State's PM and OG with respect to the claim. The OPR will make a final recommendation to the State's PM concerning settlement or other appropriate action. When requested, the OPR will further assist in negotiating the claim on behalf of the State's PM pursuant to the PM's instructions.
  - J. Building Data Sheet: The OPR will coordinate with the Architect/Engineer (A/E) of Record to prepare and update the Building Data Sheet (briefing) on the physical characteristics and estimated construction costs. This form will be provided by the State's PM.
  - K. Progress Reports: The OPR shall prepare a monthly periodic Progress Report that updates the above information.
12. Progress Meetings: The OPR will participate in regular project meetings in conjunction with the PM, OG and user agency. During the Schematic Design, Design Development and Construction Documents phases, the progress meetings will be held as required by the PM, but at least every two (2) weeks, at the Architect of Record's office or other appropriate location as agreed to by the State's PM. During the construction phase, the progress meetings will be held at least biweekly. The purpose of the progress meetings is to enable the orderly review of progress during design and construction, to provide for systematic discussion and analysis of problems that might arise between the State, Architect of Record, Construction Manager, Prime Contractor(s) and/or any Subcontractor, and to answer questions, resolve problems, review schedules, and discuss aspects or concerns of the Project. The OPR will review the minutes distributed by the A/E and contractors, and if

necessary, provide corrections or clarifications, in writing, with a copy to the OG and State's PM.

13. Other services: The OPR will provide other services normally required to manage a project of this type as an agent of the owner including presentations to community groups and communications with local municipality as directed by the PM.

## **CONSTRUCTION PHASE**

14. Construction Administration Procedures: The OPR will be the party through which supplemental agreements, payment requests, requests for information, submittals and other information will be processed and communicated to and from all parties.
15. Construction Site Meetings: Every two weeks, the OPR will participate in construction site meetings and review minutes, provide corrections or clarifications in writing to the State's PM.
16. Field Observations and Recordation: The OPR will conduct 'field' observation tours as necessary but at least every two weeks to record first hand the progress of Construction. The OPR is responsible to notify the State's PM immediately upon awareness of a potential for increase in cost or delay of construction. The OPR will monitor the consultant A/E of record's observation field reports. Observation of the work shall not include licensed A/E duties of review and observation for purposes of compliance with plans and specifications.
17. Nonconforming Work: The OPR will transmit Letters of Nonconforming Work when it is the judgment of the A/E of record that the work does not conform to the Contract Documents. The OPR will follow-up to ensure corrective work occurs.
18. Record Documents: The OPR will ensure that all Contracts, Drawings, Specifications, addenda, Supplemental Agreements, approved Shop Drawings, Product Data, Samples and similar required submittals are received, reviewed, kept in order and are packaged such for the purpose of archiving.

## **SCHEDULE**

19. Project Schedule: The OPR will monitor and review the Project Schedule and all updates to the Project Schedule and will notify the State's PM of any conflicts. The OPR will monitor and enforce the Critical Dates derived from the schedule during the design, bidding, construction and occupancy phases with all parties performing work including the activities, actions and tasks required of the PM, OG, and State's Consultants.
20. Analyzing Claims for Time: The OPR will analyze claims for extensions of time and costs. The OPR shall include a narrative of claims for time with recommendation of action to the State's PM. This narrative shall be included in the Periodic Project Report.

## **COST**

21. **General Description:** The OPR will establish and maintain a project financial status reporting system. The OPR will advise and make recommendations to the State's PM concerning the alternative courses of action that the PM may take in its efforts to complete the project in the most economical manner possible including costs related efficiency, usable life, maintenance, energy, sustainability and operation.
22. **Cost Research and Reviews:** The OPR will conduct all cost research and reviews necessary for approving supplemental agreements (change orders).
23. **Project Cost Summary Reports:** The OPR will prepare and distribute Project Cost Summary Reports regularly throughout construction, as directed by the State's PM, including updated cost information reflecting actual bid prices and construction costs versus current budget figures.

## **PROGRAM**

24. **Conformance to Design Guidelines and Sustainability Guidelines:** The OPR will closely monitor and manage the design of the building to assure the requirements of the Design Guidelines are met and the Sustainability Guidelines are followed.
25. **Space Program:** The OPR will work closely with the user agency to assure compliance with the Space Program, design-intent and adjacency relationships.
26. **Space Planning Review:** The OPR will review space plans for compliance with Budget, State purchasing rules, Space Guidelines and all furniture systems to be reused.

## **SUPPLEMENTAL AGREEMENTS (CHANGE ORDERS)**

27. **Supplemental Agreements to the Contract:** The OPR will review requests for changes, assist in negotiating proposals, submit recommendations to the PM.
28. **Supplemental Agreement Control:** The OPR will establish and implement a supplemental agreement control system. All proposed supplemental agreements will first be described in detail in a Proposal Letter generated by the A/E of record. In response to the Proposal Letter, the Contractor will be required to submit to the OPR for evaluation a detailed breakdown of the costs and time extensions, if any, necessary to perform the proposed supplemental agreement. The OPR will estimate the cost and time necessary for all Proposal Letter responses and make recommendations to the PM prior to execution of supplemental agreements. All supplemental agreements and Proposal Letters will be tracked in the OPR's log, which will be the basis for the supplemental agreement Report to the PM.
29. **Design Phase Supplemental Agreement Reports:** The OPR will prepare and distribute Design Phase supplemental agreement Reports, which will reflect all actual Design Phase supplemental agreements as of the date of the report and their effect on the original and currently approved Construction Budget and Master Schedule.

30. Supplemental Agreement and Contract Time Negotiations: The OPR will review time extensions due to a supplemental agreement. The OPR will advise the State's PM of the acceptability of time extensions requested prior to the execution of any supplemental agreement.

## **PAYMENTS**

31. Payment Applications: On behalf of the State's PM, the OPR will review and make a recommendation on all payment requests submitted by the State's Consultants, contractors and vendors. The OPR will review the payment requests submitted for accuracy and determine whether the amount requested generally reflects the progress of the work. The OPR will recommend to the PM and State's Consultants appropriate adjustments to each payment application.

## **OCCUPANCY**

32. Occupancy Permit: The OPR will assist the State in obtaining the Occupancy Permit. This task includes, where necessary, accompanying governmental officials during inspection of the construction and ensuring that proper documentation to the appropriate approving agencies and code officials is accomplished.
33. Occupancy and Move-in Activities: The OPR will prepare requests for proposals, solicit quotes, prepare contracts, conduct pre-moving conferences and administer the contract for moving activities in conjunction with move-in . The OPR will make a final report to the State's PM concerning the move-in and make recommendations as to payment to vendors.

## **PROJECT CLOSE-OUT**

34. Punch List: In conjunction with the A/E of record, the OPR will monitor the list of incomplete or defective work (punch list) prior to beneficial occupancy or substantial completion. When incomplete work or defective work has been remedied, the OPR will advise the State's PM of completeness and will ensure a Certificate of Substantial Completion is issued by the A/E of record.
35. Final Completion: In consultation with the A/E of record, and the State's PM, the OPR will document and communicate when the work is finally completed and will ensure a Certificate of Final Completion is issued by the A/E of record.
36. Project Close-out Meeting: Thirty (30) calendar days prior to the established date of Final Acceptance, the OPR will conduct a meeting with the State to review maintenance manuals, guarantees and warranties, close-out submittals, bonds, and service contracts for materials and equipment.
37. Record Documents: The OPR will coordinate and expedite submittals of information for as-built preparation and will coordinate and expedite the transmittal of record documents to the State's PM and user agency. The record documents will be submitted in electronic format and hardcopies.

38. Organize and Index Operation and Maintenance Materials: Prior to the Final completion of construction, the OPR will insure the receipt of material, such as manufacturer's operations and maintenance manuals, warranties, guarantees, etc., in an organized manner.
39. Training: The OPR will coordinate the scheduling of training of state personnel with the contractor or suppliers for operation and maintenance of the major building systems (i.e. Building Automation System, Fire Alarm System, Security System, HVAC System, etc.).

## **BIDDING**

40. Bid Package Strategy: The OPR will assist the State's PM in determining the appropriate bid packages to enable the construction of the Work to proceed in an efficient and cost effective manner.
41. Bid Package Review: The OPR will review all bid packages to ensure conformance with the contract and schedule and budget parameters.
42. Pre-bid conferences: The OPR will attend all prebid conferences for each bid package to monitor A/E clarifications to the construction documents.
43. Review and Evaluation: The OPR will assist the A/E of record to make recommendations to the State's PM on the award of contracts or rejection of bids.

**END**

**[REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK.]**