



PROGRAM | PROJECT | CONSTRUCTION MANAGEMENT

DETAILED SCOPE OF SERVICES (DESIGN-BUILD DELIVERY)

Primary Scope Throughout Project

Vanir shall serve as Owner's Representative providing a single point-of-contact for the owner. Services include all general leadership and management functions, which include but are not limited to, tracking budgets; monitoring schedules; overseeing quality of all aspects of the project; building and communicating with the project team; coordinating all issues, documentation, minutes, action items, and approvals to move the project through all its various phases; providing assistance for direct interface with the community if required, end-users, and other stakeholders; and briefing stakeholders as necessary.

- Develop Project Management Plan (PMP)
- Assist in establishing overall project budget including hard and soft costs - Total Project Cost (TPC) budget - (i.e., construction, design, management, testing, furnishings, equipment, permitting, connection fees, contingency funds, etc.).
- Develop a Project Schedule for oversight of schedule milestones throughout each phase. This will be utilized to track and verify the Design-Build entity's Master Schedule. We will coordinate with Criteria Architect and Design-Build Entity to make sure D-B entity recovers any schedule impacts.
- Develop communication protocols for the project.
- Keep stakeholder and community representatives informed and communicate with end-users to keep scope aligned with project objectives. Present to the core team and Board of Supervisors, as required.
- Assist Cochise County with stakeholder and community engagement strategy and process.
- Establish, lead, and coordinate all project related meetings.
- Cochise County to purchase Project Management Information System (PMIS) and provide required licenses to Vanir throughout the project lifecycle. Vanir to oversee the web-based (PMIS) purchased by Cochise County that provides the selected project participants the ability to track the entire project and provide a repository for all project documentation.
- Coordinate with all external approval authorities, as required.
- Provide any necessary liaison with the Authorities Having Jurisdiction (AHJ) as the Owner administration directs.
- Provide project executive services as advisor to the Owner.
- Identify the need for special studies, surveys, investigations, etc., and assist in procurement and implementation of contracts as necessary.
- Develop a filing and document control system for the project for hardcopy and electronic records.
- Assist with procurement of all consultants and third-party vendors, including RFQ/P document preparation, evaluation and selection of architect(s), consultants, and contractor(s).
- Manage and/or Assist in managing all contracts (Criteria Architect, Design-Build Entity, and special consultants such as Geotech, Commissioning, etc.) related to the project.
- Monitor and assist in managing payments to consultants and contractors.
- Provide cash flow projections and work with accounting/financial stakeholders, as required.
- Coordinate with the Criteria Architect and Design-Build entity regarding sustainability and energy efficiency requirements as needed.



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Procurement: Selection & Contracting for Consultant Services

Note: The following process steps are followed, with some variation, for design firms and builder firms for all the delivery methods applicable to the County of Cochise. The process may be used several times during the project. It may include assistance in solicitation document preparation, proposal evaluation, selection committee facilitation, negotiation with the selected firm, and preparation of the contract documents and associated documents to implement award of the Qualification Based Solicitation/Best Value agreement/contract.

- Assist in Preparing Requests for Qualifications (RFQs) and Requests for Proposals (RFPs), and guide committees through fair, objective, and equitable selection process that adheres to all legal requirements of contracting and purchasing for the Owner.
- **Specific activities for this phase typically include assisting Owner with:**
 - Developing RFQs and RFPs documents.
 - Reviewing and assisting with agreement/contract, working with Owner's legal staff.
 - Organizing the selection committee(s).
 - Establishing selection criteria.
 - Advertising the Request for Qualifications (RFQ) or Request for Proposals (RFP)s, contingent on 1 or 2 step process.
 - Receiving and evaluating qualifications.
 - Convening the selection committee and developing a short-list of the most qualified candidates.
 - Requesting Proposals (RFP) from the short-list, if applicable.
 - Receiving and evaluating proposals.
 - Convening the selection committee and discussing proposals.
 - Interviewing of proposers with selection committee.
 - Facilitating the committee selection of best firm.
 - Negotiating contract with selected firm (if possible, otherwise go to second ranked firm).
 - Finalization of contract and preparing presentation material for governing body and/or executive approval.
- Maintain appropriate confidentiality and comply with the open records process as may apply to the Owner.
- Work with Owner to provide the owner's draft agreement/contract to include in the RFQ/RFP in order to eliminate extended negotiation of terms after selection and to affect the documents required to manage the project more effectively.
- Coordinate with the owner to ensure all procedures are in compliance with statutes and regulations.
- Assist owner in providing follow-up and de-briefing sessions with non-selected firms.
- Collect and assist in processing all required documents from contracted firms before proceeding with work. (i.e., bonds, insurance, etc.).
- Coordinate issuance of Notices to Proceed (NTPs) on appropriate phases when all necessary requirements have been completed.
- Assist in carrying out necessary contractual actions and transactions during the various contracts/contract phases.



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- Assist in procuring specialty consultants such as surveyor, geotechnical engineer, hazardous material and abatement firms, test and balance firm, commissioning agent, materials testing firms, independent design consultants, and peer reviewers, as required.

Construction Contractor Specific Procurement:

- Review standard construction contract for billing, procurement, timelines, change orders, applications for payment, and all processes required.
- Assist owner with Design-Build contractor selection criteria and review of contractor qualifications and capability to perform scope of work and comply with schedule, programming guidelines, and specifications.
- Assist owner in negotiating with Design-Build contractors; re-bid or re-negotiate project if lowest bid or proposal is greater than project budget after selection of contractor by owner.
- After selection of Design-Build contractor by owner, assist with transmitting standard procurement requirements to contractors and subcontractors.
- Review information submitted by Design-Build contractor to include insurance, appropriate employee pay scales, material suppliers, subcontractors list, bonds, and financing.

Pre-Design/Construction Planning Phase

- Assist with managing Pre-Design Planning Phase including development, implementation of processes, policies, procedures.
- Review existing owner baseline data and identify additional information needed for master planning and design.
- Assist in the selection/procurement/contracting of consulting firms.
- Provide overall project management of each consultant and work tasks.
- Assist in evaluating engineering and environmental studies and apply results to the planning process.
- Assist owner in coordinating critical project issues with local governing agencies and authorities having jurisdiction.
- Assist in creating, updating and refining overall Total Project Cost (TPC) budget including hard and soft costs. (i.e., construction, design, management, testing, furnishings, equipment, permitting, connection fees, contingency funds, etc.)
- Assist in creating, updating and refining Project Schedule.
- Develop responsibility matrix.
- Coordinate programming and master planning phases, including option analysis to right-size scope to meet budget and schedule needs.
- Conduct Pre-Design Planning meetings and provide meeting minutes.

Criteria Architect Phase

- Conduct kickoff meeting with owner, Criteria Architect, and other stakeholders.
- Communicate all pre-project planning information to Criteria Architect.
- Conduct programming/design meetings between owner and Criteria Architect; document and resolve issues.
- Validate contractor's program/schematic design cost estimate; reconcile and take action to keep cost under control.



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- Review schedule and conduct schedule optimization session.
- Participate in Criteria Document reviews for completeness, constructability, and cost savings. Coordinate, review, and evaluate all documents submitted by Criteria Architect, designers and consultant engineers for compliance with owner's design guidelines, space program needs, and performance specifications.
- Conduct PDRI analysis, if required. (Scope to be determined; if Owner elects to participate in a PDRI or Partnering Session, Vanir will manage the process and assist in procurement of the consultant. At the Owner's request, Vanir will contract directly with a Partnering consultant as additional services.)
- Assist with best-cost analysis reviews to determine building systems.
- Assist in any value engineering sessions and track approvals.
- Initiate planning for commissioning and start-up. Begin this process early to define requirements, costs, and schedule.
- Initiate planning for quality assurance/control and safety. Begin this process early to define requirements, costs, and schedule.

Criteria Architect & Design-Build Document Development Phase

- Oversee preparation of design development documents addressing architectural, structural, mechanical, and electrical systems, materials, and other appropriate elements.
- Conduct regular meetings between owner and criteria architect and/or design-builder to review and evaluate design documents for compliance with guidelines, objectives, and goals.
- Conduct/assist in review of schedule and schedule optimization session(s).
- Validate design development cost estimate; reconcile and take action to keep cost under control.
- Participate and assist in value engineering session(s) and track approvals.
- Participate in drawing reviews for completeness, constructability, and cost savings. Coordinate, review, and evaluate all design development documents submitted by designer and its consultants for compliance with owner's design guidelines, detailed program needs, and performance specifications.
- Assist in PDRI analysis, if required (Scope to be determined).
- Assist review in any Constructability Program.
- Assist in presentation to the stakeholders design development approval package(s).
- Continue planning for commissioning and start-up.
- Continue planning for quality assurance/control and safety.

Construction Documents Phase

- Review/oversee preparation of construction documents addressing all project elements.
- Conduct design review meetings and project management meetings with owner to update on progress, financial status, construction issues, and use of project contingencies.
- Assist in coordination with governmental entities for any building or statutory reviews and other approvals.
- Participate in drawing reviews for completeness and constructability. Coordinate, review, and evaluate all construction documents submitted by design-builder and subconsultants for compliance with owner's design guidelines, detailed program needs, and performance specifications before procurement of subcontractors.



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- Conduct reviews of and validate design-build contractor's cost estimate(s); reconcile and recommend action to keep cost under control.
- Review/track details of schedule, including major construction elements, and conduct schedule optimization session(s) if needed.
- Participate in review of constructability program.
- Assist owner in final review/approval of construction documents prior to permit submission.
- Implement change management system to control scope creep.
- Continue planning for commissioning and start-up.
- Continue planning for quality assurance/control and safety.

Construction Phase

- Serve as the owner's point-of-contact during construction. Conduct construction update meetings at construction site on as-needed basis.
- Conduct Kick-off meeting at beginning of the construction phase to include all subcontractors, if required.
- Review required documents/outlines from contractor including quality control plan, safety plan, environmental compliance plan, HUB contracting plan (if required), local and WMBE participation plan (if required), and report to contractor and owner.
- Review contractor's general conditions, mobilization, demobilization, staging, laydown, and site logistics with owner.
- Administer construction contract and general conditions and serve as owner's representative.
- Review compliance with all plans, specifications, and required terms and conditions and report to owner on status.
- Assist owner in contracting with independent testing firms and review testing program results when/where necessary. (Tests typically include soils and materials testing, building envelope testing, concrete, welding, compaction, etc.)
- Provide onsite construction management.
- Conduct site visits, daily site walks and observation to review work in place and report to owner with reference to facilities standards/specifications, schedules, and budgets. Monitor construction progress and advise owner of any observations of non-conforming scope or quality workmanship.
- Provide field and quality assurance oversight.
- Review submittals, obtaining owner comments within designated review timeline.
- Managing the overall information flow during construction including submittals, RFIs, daily reports, photos, and meeting minutes through a web-based information management system.
- Continue the change management system into construction phase. Analyze each potential change, estimate cost, and schedule, assess its impact, and negotiate the change amount. Evaluate requests for proposed change orders and construction change proposals and make recommendations. Assist in executing necessary contract modification documents.
- Monitor Requests for Information.
- Assist with coordination of vendors under separate contract to owner, such as security, data, telecom, furniture, move management, etc.
- Review contractor's building commissioning and turnover plan as a part of planning for start-up.
- Evaluate payment applications and make recommendations to owner on approval of requests for progress payments.



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- Assist in performing final observations and review punch list work.

Commissioning and Turnover Phase

- Assist with reviewing the results for HVAC test and balance with regards to compliance of the construction contract requirements.
- Assist in monitoring all pre-functional testing and check-out for compliance with commissioning plan.
- Oversee turnover of all certification documentation and submittals to proper agencies on behalf of owner.
- Assist training coordination of facility maintenance staff for familiarization with all systems.

Warranty and Occupancy Phase

- Assist the review of all contractual and warranty obligations for compliance including the issuance of all documents such as operations and maintenance manuals.
- Assist with monitoring status of as-built conditions and verification that as-built details are incorporated into contract drawings.
- Generate and manage a system for delivery of all warranty deadlines for each project.
- Assist with coordination of owner plan for reviews of warranty items after a 30-day, six-month and 11-month periods.
- Assist with coordination of owner plan for post-occupancy evaluation of facility prior to warranty expiration.
- Assist with coordination plan for warranty issues between owner and contractor and ensure timely resolution.

Activation / Training Phase

- Assist owner with activation plan.
- Assist owner with move management plan including phased moves/occupancy.