

SCOPE OF SERVICES
PROJECT MANAGEMENT SERVICES PROPOSAL

1. **Owner Name: City of Schertz**
2. **Program Name: Fire Station #4**
3. **Performance Period: August 2023 – October 2025**
4. **Owner Site(s) listed below: TBD, Live Oak Hills**
5. **Services: Project Management**
6. **Owner's Manager: TBD**
7. **Scope of Work: New Fire Station, 15K-25K SF.**

Pre-Construction and Procurement Phase

- **Third Party Procurement:**
 - Assist with scoping and contracting of feasibility studies, geotech, environmental reports and other third-party design phase contracts held by the Owner.
- **Contractor/CM at Risk Procurement:**
 - Assist in developing RFP/RFQ documents for procurement of General Contractor/CM at Risk depending on project delivery method.
 - Assist in selection/evaluation of General Contractor/CM at Risk.
 - Review or make recommendations for contract language for Contractor/CM at Risk.
 - If CM at Risk delivery, work with selected CM at Risk to develop a project buyout strategy.
 - Work with CM at Risk to track project buyout.
- Review design documents, drawings and specifications for constructability, scheduling, consistency and coordination.
- Establish and maintain communication protocol between the Owner, Architect and General Contractor/CM at Risk.
- Work with design team and Owner to ensure the project has an established gated design review process and that pertinent project stakeholders are engaged in the design development and review process.
- Monitor all party's efforts for conformance to the master schedule and budget.
- Notify Owner of design concerns that may impact master budget and schedule.
- Develop detailed cost estimates at various phases of design, upon request as an additional service. Provide estimate reconciliation with any other third party estimates or estimates provided by a CM at Risk, upon request as an additional service.

- Assist in development of value engineering options as requested.
- Assist in development of contract negotiation process and aid in review, approval or disapproval of General Contractor numbers, or CM At Risk's guaranteed maximum price.
- Coordinate with local Utilities, Cities, Entities, etc on Owners behalf as required.

Construction Phase

- Establish and maintain communication protocol between the Owner, Architect and Construction Contractor.
- Monitor overall budget and schedule and advise the Owner of any trends that affect the completion of the Project and or Project budget.
- Maintain general knowledge of the plans and specifications.
- Coordinate construction logistics between the Contractor and the Owner.
- Attend, arrange and conduct a variety of meetings, as requested by the Owner.
- Review applications for payment and make recommendation for approval based on actual progress to date.
- Change Management:
 - Review and track requests for information (RFI) and architect's supplemental instructions (ASI). Work with Contractor to forecast potential cost impacts of each.
 - Review and analyze proposed change orders and make recommendations to Owner. Change orders will be reviewed for cost and schedule impacts prior to recommendation.
 - Update project budget to ensure all approved and pending changes are accounted for.
- Schedule Management:
 - Review and track requests for information (RFI) and architect's supplemental instructions (ASI). Work with Contractor to forecast potential schedule impacts of each.
 - Review contractor provided schedule updates for accuracy and coordination with Owner activities.
- Quality Assurance:
 - Periodically observe the work for progress, workmanship, and general conformance with the Contract Documents.
 - Generate periodic site visit reports describing general events, noting problems and unusual events.
 - Take appropriate photographs that document construction progress and general conformance with the plans and specifications.
 - Coordinate and track all Owner testing.
 - Review special inspection and material testing reports by others to verify conformance with the Contract Documents.
 - When work is found to be in non-conformance, document the deficiencies and provide notification of deficiencies to the appropriate project team members.

- Work to ensure deficiencies have been corrected and approved by applicable party including the Architect or Engineer of record as required.
- Coordinate preparation of the punch-list by the Architect or Engineer of record and endeavor to ensure corrective work by the Contractor.
- Coordinate Owner Activities (Occupancy, FFE procurement, Technology, etc).

Closeout Phase

- Endeavor to ensure that:
 - Project Record Documents are transmitted from Contractor to Design Team to Owner.
 - O&M Manuals are transmitted from Contractor to Design Team to Owner.
 - Warranties are transmitted from Contractor to Design Team to Owner.
 - Staff has received necessary training for operation of new building and systems.
- Work with Owner and Contractor/CM at Risk to develop a warranty phase protocol.

8. Service Fees and Expenses:

Based on this Scope of Services, Project Manager’s Project Fee is [Four Hundred Twenty Nine Thousand, Eight Hundred Eighty-Five] dollars (\$429,885.00) (“Project Fee”). Project Manager will exercise due care and diligence in monitoring the Program Fee. Further, Project Manager shall notify Owner if additional hours in excess of the Project Fee will be needed to align the Project Fee with actual design and construction progress or additional services required by Owner and mutually agreed upon by the Project Manager.

Program Manager will bill the Owner monthly for the actual number of hours worked by the Program Manager multiplied by the hourly rates set forth as follows:

<u>Position Titles</u>	<u>Hourly Rates</u>
Project Adviser	\$215 (2023), \$223.60 (2024), \$232.54 (2025)
Project Manager	\$185 (2023), \$192.40 (2024), \$200.10 (2025)

9. Owner Responsibilities:

10. Other Requirements, if any:

