

Owner's Representative Scope Matrix

Rev 11/11/2013

The following matrix is a worksheet to identify required and optional scope for Owner's Representative services. Please identify the scope represented by your proposal. For items with enhanced, limited, or excluded scope, please provide a description in your proposal narrative, with a page reference in the matrix below. Please list any other additional services proposed in the section provided at the end of the list below. *Any non-required scope proposed should be broken out as a line-item in the fee proposal.*

Scope/Task	Required	Provided	Excluded	Comments:
Pre-Design				
Review Owner's master plan and the project as presented in the BEST grant application. Review scope/ program and costs and understand the Owner's goals for the project. Note allowances, owner soft costs, escalation and any other specific line items as they relate to the entire project and budget.	x			
Assist the Owner on the formation of committees for the selection of all project consultants.	x			
Assist the Owner on the formation of a committee of committed stakeholders for the purposes of design review, finish review, and mechanical systems, material, and equipment decisions.	x			
If requested, be prepared to chair each committee and display skills in meeting management in order to streamline commentary and decision making process. The Owner's Representative should be guiding the committee with appropriate recommendations consistent with outlined goals for the project.	x			
Assist the Owner with selection of a delivery method most appropriate to the schedule and the outlined goals for the project.	x			
Determine what consultants and services will be necessary to deliver the project in compliance with all applicable Federal/State/Local regulations, and oversee the permitting, procurement, contracting, monitoring, and management of all project consultants, design professionals, contractors and vendors and their associated scope on behalf of the Owner.	x			
Assist the Owner with the selection of consultants/contractors through a qualifying and selection process as coordinated with CDE Capital Construction Assistance staff. Provide detailed analysis and advice to the Owner in the evaluation of proposals.	x			

Scope/Task	Required	Provided	Excluded	Comments:
Assist with selection of consultants through a qualifying and selection process that are not part of the architect's consultant team but will have contracts with Owner, such as environmental, geotechnical, third party testing and inspections, FF&E, technology, etc.	x			
Assist Owner in implementing the requirements of SB07-051 (third party certification of high performance building criteria) which includes the selection of consultants capable to provide expertise in high performance design including high performing energy options. Understand the difference in the various certifying agencies and recommend the most appropriate for the Owner goals in the project. Engage Governor's Energy Office or other as appropriate in the development for energy alternatives.	x			
Assist the Owner with the development and review of contracts with consultants and assist in the negotiation of fees and contracts with consultants. Contracts will be reviewed by the Owner's attorney; however, consultant will assist with understanding the sublease language signed by the Owner for financing and the coordination of all contracts and signed agreements with regard to the sublease or cash grant agreement for the BEST grant. All potential outside agreements that involve the collateral and sublease must be reviewed with CDE Capital Construction staff before the Owner engages in a contract.	x			
Identify all State and Local agencies that will be utilized during the review process and oversee the submittal process. This will include coordination of all road improvements/ site development requirements with State and Local agencies.	x			
Assist the Owner in procuring and managing environmental, geotechnical, and other consultants in order to identify the project existing conditions in preparation for construction or demolition work.				
Coordinate with the design team throughout the design phases and create progress reports to be delivered to Capital Construction Assistance staff and the Owner's board of directors as design proceeds.	x			

Scope/Task	Required	Provided	Excluded	Comments:
Develop and update a Master Budget, as defined in the grant application, to be tracked from start to completion of the project. Maintain accountability to the budget, assist the Owner with monitoring, identify cost savings and design options/products, maintain and review project costs to confirm that the project is designed within the budget and to avoid value engineering at the end of the design process. Serve as liaison with CDE Capital Construction Assistance staff in all budget matters. Owner's Representative is to maintain, track and coordinate use of the projects reserve account with the BEST staff. At no time should the reserve account be used for project financing unless reviewed and approved by the BEST staff.	x			
Compile and update Master Schedule milestones for all design phases, design review, bidding activities, purchase of major equipment, lead times for fixtures and equipment, coordination of activities outside construction, and coordination of key points with CDE Capital Construction Technical Assistance staff.	x			
Establish Owner's Representative as the central point of contact for coordinating all project activities including process for approvals, maintenance of project records, responses to inquiries from consultants, suppliers and contractors, transfer of information to decision makers, coordination of project information flow and progress reports to the Owner, CDE Capital Construction Staff, and general public as required.	x			
Assist the Owner with developing/ implementing and coordinating technology needs. Assist with the selection of consultants and vendors.	x			
Assist with Schematic Design				
Orchestrate initial reviews with the State and Local agencies with jurisdiction over the project and understand the process that must be followed for final approvals. Include in master schedule.	x			
Initiate a project review process to review, at a minimum, design options for interior and exterior, high performance design, student and staff safety, code compliance, adherence to school program and resolution of deficiencies identified in the State Facility Assessments with appropriate Owner committees/ personnel/ stake holders etc...	x			
Become familiar with the requirements of SB07-051 and coordinate third party high performance building certification requirements for the project.	x			

Scope/Task	Required	Provided	Excluded	Comments:
Review project as it relates to the BEST Program guidelines and coordinate with CDE Construction Assistance staff as necessary with any deviations.	x			
Review product selections and specifications for ease of maintenance/warranties/environmentally responsible products and solicit input from maintenance personnel to standardize equipment and construction materials. Verify that selected materials are consistent with the goals set forth for the project.	x			
Assist with the outline of a capital reserve budget program that addresses the life cycle of equipment and systems of the project.	x			
Facilitate the review of the interior design by the Owner's committee, document decisions and verify that final design and installation is consistent with the finish selections made. Take necessary action such that Architect / Interior designer provides finish board upon approval of the interior design.	x			
Maintain design team accountability to the design intent as described in the project scope and approved BEST grant application.	x			
Provide weekly status reports to the Owner and CDE Capital Construction Assistance staff summarizing progress, schedule and cost status, major decisions, changes and other key project information.	x			
Oversee the establishment of a schematic design estimate and take necessary action such that project is within budget prior to proceeding to Design Development.	x			
Assist the Owner in their review and approval of schematic design.	x			
Notify CDE's Capital Construction Assistance staff of the intent to approve schematic design to proceed into Design Development.	x			
Assist with Design Development				
Assist the Owner in developing FF&E requirements including inventory of all existing FF&E. Monitor FF&E budget for compliance with BEST grant budget. Assist the Owner with the selection of an FF&E vendor or if included in the design team's scope, review all decisions with the Owner.	x			
Assist in continued development of the capital reserve budget accounts as system and equipment selection is refined and life cycles are more specific.	x			

Scope/Task	Required	Provided	Excluded	Comments:
Initiate project review of drawings/specs and cost estimate with Owner and CDE Capital Construction staff for review prior to proceeding to Construction Documents.	x			
Provide weekly status reports to the Owner and CDE Capital Construction Assistance staff summarizing progress, schedule and cost status, major decisions, changes and other key project information.	x			
Assist with Construction Documents				
Assist in continued development of building renewal program/strategies.	x			
Orchestrate and assist the Owner in the review of construction documents/specifications and cost estimates for approval of construction documents.	x			
Coordinate acceptance of the Construction Documents and finalize pricing.	x			
Assist the Owner with development of a maintenance plan based on the approved design specifications, including development of a Green Housekeeping Plan to be used as a LEED Innovative Credit.	x			
Provide monthly status reports to the Owner and CDE Capital Construction Assistance staff summarizing progress, schedule and cost status, major decisions, changes and other key project information	x			
Assist with the Bidding Process				
Confirm that the permit process is completed prior to start of construction, that an early start permit has been obtained if necessary, and coordinate with agencies affected.	x			
Coordinate and review any modifications to pricing with the Owner and the CDE Capital Construction Assistance staff.	x			
Review insurance and bonding requirements. Ensure general contractor insurance certificates meet the requirements of the sublease. Once insurance and bonding certificates have been received and approved by the OR, forward certificates to CDE. As the general contractor's insurance is renewed the OR is to provide updates to the BEST staff until the general contractor no longer holds the project insurance.	x			

Scope/Task	Required	Provided	Excluded	Comments:
Review subcontractor bids and process and confirm that a competitive process has been followed in obtaining bids from subcontractors, assist in the review of bids and subcontractor selection, and take necessary action such that subcontractors are properly insured.	x			
Oversee Construction Process				
Assist with the development of a safety plan for the construction site.	x			
Take necessary action such that terms of the contract are enforced.	x			
Monitor safety compliance with all Federal/State/Local requirements (not limited to OSHA, EPA, and EEO) thru the General Contractor.	x			
Coordinate moving and storage of equipment and furnishings as necessary.	x			
Assist with placement of construction trailers, fences, signage, staging areas, and construction traffic zones.	x			
Attend Construction Meetings as established (weekly or bi-weekly).	x			
Review construction progress as provided in construction management programs and take necessary action such that weekly minutes are accurate (including but not limited to construction progress, cost concerns, schedule, and outstanding issues). Serve as distributor of progress reports.	x			
Advise the Owner on issues including construction costs, schedule, coordination, and owner occupancy. Notify CDE Capital Construction Assistance staff if there is deviation from project progress.	x			
Verify and document that inspections and testing reports take place as required. Review reports to take necessary action such that deficiencies are addressed.	x			
Photograph construction progress. Provide observations regarding quality of workmanship, conformity to plans and specs. Address corrective measures to mitigate and correct non-conforming workmanship per the Contract Documents as identified by the Architect or Contractor. Notify the Owner of non-conforming work with the Contract Documents. OR to coordinate with all consultants/ vendors responsible for the non-conforming work to implement a corrective solution.	x			

Scope/Task	Required	Provided	Excluded	Comments:
Participate as part of the communications and distribution of construction directives including, but not limited to RFI, PCO, ASI actions.	x			
Assist the Owner in the review of pending Change Orders and notify the CDE Capital Construction Assistance staff of such. The OR should review with the design team the proposed scope and costs assigned with the pending change order prior to reviewing with BEST staff.	x			
All BEST grant awards include monies set aside in the form of a grant reserve allocation. This is provided to assist with unforeseen conditions during the project. These are conditions that could not have been anticipated prior to submitting the grant application. The OR is expected to assist the district with identifying these conditions and to notify the BEST staff when a grant reserve is considered. The OR is to assist the district with documenting the request in the form of a Grant Reserve Request, with scope identified and all costs associated with the request identified. The OR is to review with the BEST staff on the behalf of the district. The OR is to assume the potential for this documentation and process falls within their base fee.	x			
Resolve any disputes or claims prior to final approval or denial of a Change Order.	x			
Review appropriateness of each pay application with the design team and take necessary action such that lien/claim releases are executed and included with all pay applications and all disputes or claims are resolved prior to approval of a pay application. Owner's Representative will submit fund requests to CDE BEST staff. The Owner's Representative will be responsible for accuracy of the request and will coordinate with BEST staff any comments or questions. Accurate and appropriate backup will result in quicker payment to all vendors.	x			
Solicit and receive bids, coordinate delivery and installation for Owner purchased items which are contracted through the Owner including but not limited to FF&E.	x			
Assist with coordinating environmental and abatement work with demolition and construction activities as it applies to the project	x			

Scope/Task	Required	Provided	Excluded	Comments:
Assist with scheduling and implementation of technology and security as it applies to the project.	x			
Assist the Owner with any concerns and/or complaints by staff, community members, and parents during construction.	x			
Provide weekly status reports to the Owner and CDE Capital Construction Assistance staff summarizing progress, schedule and cost status, major decisions, changes and other key project information.	x			
Assist with third party high performance building certification requirements from the Owner's Perspective				
Coordinate with Design Team and assist in understanding the value of each criteria outlined by the third party certification process chosen by the project team. Have knowledge of the various certification agencies and their requirements and help the Owner select the most appropriate process/agency for achieving goals outlined for the project.	x			
Assist With the Close-Out of the Project				
Coordinate the moving of new/old/stored furnishings and equipment into the completed facility.	x			
Take necessary action such that there is a seamless handover to the Owner.	x			
Schedule and assist the Owner in developing punch lists for the project completion and attend all walk-throughs.	x			
Coordinate and attend the training of staff on <u>all</u> systems including but not limited to mechanical, lighting, new equipment, etc. Verify that the Owner has been adequately trained in systems. Consider training that occurs over a period of time in lieu of too much information in too short of time.	x			
Coordinate transfer of stock supplies of materials to the Owner as indicated in the specs or construction agreement.	x			
Assist the Owner in the collection of all close-out documents and the acceptance of punch lists, Operational /Maintenance Manuals/Warranties, copies of construction drawings (including any as-builts or mark-ups by contractor during construction), specifications, shop drawings, construction directives, photos, and videos.	x			
Provide description of final budget with record of expenditures.	x			

Scope/Task	Required	Provided	Excluded	Comments:
Assist the Owner in acceptance and issuance of the final pay application and verify that the advertising for final payment has been completed. This will include coordination with the BEST staff and the close out of the BEST grant and any required documentation including insurance to close out the financing.	X			
Oversee that all Third Party inspections are complete and all violations are corrected to allow for the issuance of a final certificate of occupancy (CO). If inspections are not complete and a building requires immediate occupancy and appropriate inspections indicate there are not life safety issues and a temporary certificate of occupancy (TCO) is issued, that prior to 90 days of issuance all inspections are complete to obtain a CO or a renewal of the TCO pursuant to 22-32-124.	X			
Initiate a team evaluation of the process and final product and include lessons learned for all participants.	X			
Take necessary action such that proper inspections have been conducted, documented, and all permits are in place.	X			
Assist the Owner During the Warranty Period				
Assist the Owner with determining the warranty period. If an extended warranty is considered, assist the Owner with understanding the cost and value associated with extended warranties to evaluate if the Owner wants to consider for additional cost.	X			
Schedule the 11 month warranty walk through with the design team if the warranty is minimum of 1 year.	X			
Schedule the additional warranty walk throughs as required (e.g., 23 month walk through).	X			
Assist the Owner with building issues/complaints and determine necessary steps to take to address these items. Address warranty items to confirm the requirements of the warranty are met.	X			
Provide status reports to the Owner and CDE Capital Construction Assistance staff summarizing progress, schedule and cost status, major decisions, changes and other key project information affected through the warranty period.	X			
Assist with School Operations				
Identify interim storage needs and locations if necessary.	X			

Scope/Task	Required	Provided	Excluded	Comments:
Review with the Owner the options for the remaining existing facilities. If the Owner would like to engage the OR with options etc... provide a separate fee proposal for the extended assistance.	X			
Coordinate School and Community Involvement				
Promote that staff and students are engaged in the progress of the project, identify key educational learning opportunities in the design and construction process, and cooperate and facilitate with the Owner's staff, the creation of learning packages for students of all ages.	X			
Coordinate and facilitate presentations to students, parents, staff and the community at large throughout the process. Make presentations at SD, DD and CD phases of the project.	X			
Consult with Owner's web site administrator to post presentations, schedules and important messages about the project.	X			
Assist the Owner with evaluating recommendations made by the design professionals on how to implement HP design opportunities such as solar power on the building including rebates or assistance that may be available from outside sources.	X			
Assist with Post Occupancy				
Execute monitoring and building performance evaluations at the 11th and 23rd months if provided after completion. Assist the Owner with defining and soliciting extended services of the commissioning agent or others to monitor energy usage until just prior to expiration of the relevant warranties and to assist the Owner with operations as needed during the first 24 months.	X			
Be available to assist with curriculum development/demonstration projects related to the building.	X			
Coordination of Stakeholders				
Identify stakeholders to the project.	X			
Coordinate stakeholder input and communication throughout process.	X			
Grants/Rebates				
Coordinate with grant committee to apply for GOCO grants or rebates / credits that may be available for the use of High Performance Building techniques or systems or other available grant opportunities.	X			
Other Liaison/Grant Compliance				

Scope/Task	Required	Provided	Excluded	Comments:
Serve as liaison/ coordinate between the Owner and other funding entities throughout the design/construction process/project close out and warranty period.	X			
Keep staff up-to-date as the project progresses and decisions are made.	X			
Comply with all grant requirements and reports.	X			
The Owner's Representative will become familiar with the language in the sublease the Owner will sign for financing thru the BEST program and will be responsible to coordinate with the Owner and the Owner's legal attorney that all contract language does not conflict with the language in the sublease. The sublease will supersede all other contracts.	X			
Any other assignment as determined by the Owner's construction committee and CDE staff to facilitate and enhance the successful completion of the Project. If the Owner's Representative identifies a request is out of the scope of the contract, the Owner's Representative must notify the Owner immediately, at which time the Owner's Representative must provide the Owner with a description of the added scope and costs associated with the identified task and must have acceptance by the Owner of the added cost prior to start of identified scope. Any decisions should not impact the progress/ process of the project.	X			
Reports on daily operation and specific problems to the Owner's capital construction committee and routinely to the superintendent, principals, and board directors (including attendance at meetings) as requested.	X			
Limitations of Authority				
The Owner's Representative shall NOT:				
Authorize deviations from the Contract Documents.	X			
Approve substitute materials or equipment except as authorized in writing by the Architect and the Owner.	X			
Personally conduct or participate in tests or third party inspections.	X			
Assume any of the responsibilities of the Contractors or of Sub-contractors.	X			
Expedite the work for the Contractor.	X			

Scope/Task	Required	Provided	Excluded	Comments:
Have control over or charge of or be responsible for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the work.	X			
Issue a Certificate for Payment or Certificate of Substantial Completion or sign on the Owner's behalf.	X			
Prepare or certify the preparation of a record copy of the drawings, specifications, addenda, Change Orders and other modifications.	X			
Reject work or require special inspection or testing except as authorized in writing by the Architect.	X			
Accept, distribute or transmit submittals made by the Contractor that are not required by the Contract Documents.	X			
Order the Contractor to stop the work or any portion thereof, except for safety reasons that immediately affect the life and safety of any staff or person.	X			
Additional Services Proposed by Candidate				