

EXHIBIT A-1

OWNER'S PROJECT REPRESENTATIVE

SCOPE OF SERVICES, DUTIES and RESPONSIBILITIES

GENERAL DESCRIPTION

1. General responsibilities and services: Provide the detailed services, duties and responsibilities, described herein, and integrate those into the following General responsibilities:
 - a. Project Management: Oversee and monitor the project cost, scope and schedule including critical path and definition of project milestone dates.
 - b. Program Management: Oversee and Monitor all elements to ensure a clearly defined project (scope, schedule and budget) at each stage of the project, continuous collaboration among all team members and stakeholders throughout the project, and owner's and tenant's expectations are met.
 - c. Communications Plan: Prepare a communication plan in collaboration with the owner's group, user group and design-build team to keep stakeholders and project team members informed on the status of the project. Provide project information and updates for project website(s) as communication tool for owner's group, user group, other project team members and public throughout the project.
 - d. 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).
 - e. Attend Project Meetings (during pre-design, design, construction, and post construction phases of the project) and review meeting notes for compliance to project goals.
 - f. Prepare RFPs, contracts, amendments and miscellaneous correspondence for State official's signature.
2. Detailed Duties of the OPR: The following is a detailed description of the OPR's duties and responsibilities:

OWNER//USER AGENCY COORDINATION

3. Project Manager: Interface, facilitate and coordinate activities related to assigned Projects. All cost, scope, program and schedule changes must be approved by the OPR in writing.
4. Owner's Group: Participate in meetings for the purpose of monitoring and reporting on the status of the cost, scope and schedule of the project.
5. User Group: Participate in meetings for the purpose of monitoring and reporting on the status of the cost, scope and schedule of the project.

6. Project Reporting: Report (in bound report) the monthly/biweekly/weekly progress, project costs to date, milestones accomplished, next months scheduled progress, change and cash flow.
7. Collaboration: Facilitate and coordinate communications between the design-build team and the user group on information gathering, analysis, and documentation of space and other requirements.
8. Project Meetings: Participate in project meetings and review documents to verify implementation of the project definition documents through the design and construction phases.
9. Quarterly Performance Reviews: Oversee and participate in quarterly meetings to review and evaluate the performance of the project team.

COMMUNICATIONS

10. Provide project information testimony as requested for legislative, capitol area architectural and planning board and other stakeholders
11. Provide project information for communication with building tenants, legislative committees and other stakeholders
12. Prepare periodic reports, information and communications as requested for RECS
13. Provide project information and updates for project website(s) as communication tool for project team members, building tenants and public throughout the project

STATE'S CONSULTANTS

14. Responsibilities related to State's Consultants: Perform contract administration on state contracts for design-build team and other project consultants, including performance of work in order to achieve compliance with the project cost, scope and schedule. Recommend courses of action when requirements of the Project are not being fulfilled.
15. Scheduling: 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. Advise and make recommendations concerning alternative courses of action in its efforts to achieve completion of all activities, tasks, actions and deliverables.
16. Contracts and Request for Proposals: Prepare request for proposals and qualifications (RFPs/RFQs), prepare design scopes of work, assist with executing design contracts, and amendments. Review and evaluate proposals and make recommendations of the proposal offering the best value to the State. Assist in negotiations with selected responders.

PROJECT MANAGEMENT

17. **Project Management Plan**: Prepare a Project Management Plan in collaboration with the owner's group, user group, and design-build team. Update the Project Management Plan as additional information becomes available. Distribute all updates to the Project Management Plan to project stakeholders. 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 building occupants, Owner's 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.
 - 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**: 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**: Maintain, monitor and report on changes to the scope of the project including their impact on the budget and schedule.
 - F. **Schedule**: Review schedules and 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**: 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* and other State requirements.
 - I. **Claims**: Report on all consultant and contractor claims and update the status as it occurs. 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 with respect to the claim. Make a final recommendation concerning settlement or other appropriate action. When requested, assist in negotiating the claim.
 - J. **Building Data Sheet**: 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.
 - K. **Progress Reports**: Report on monthly/periodic progress that updates the above

information. Submit a draft format for monthly report for review and approval.

- L. Implement State's project management software (Project Web Application with MSProject) to maintain project data and track progress.
 - M. Coordinate with State Consultants and Construction Manager to provide information needed to maintain updated project websites.
18. Progress Meetings: Participate in regular project meetings in conjunction with the owner and design-build team. During the Schematic Design, Design Development and Construction Documents phases, the progress meetings will be held as required by the Owner, but at least every two (2) weeks, at the Architect of Record's office or other appropriate location as agreed to by the Owner. During the construction phase, the progress meetings will be held at least weekly. 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, Design-Build Team and/or any Subcontractor, and to answer questions, resolve problems, review schedules, and discuss aspects or concerns of the Project. And, review minutes distributed by the Design-Build Team, and if necessary, provide corrections or clarifications, in writing.
19. Other services: Provide other services normally required to manage a project as an agent of the owner including presentations to community groups and communications with local municipality as needed.

CONSTRUCTION PHASE

20. Construction Administration Procedures: This position 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.
21. Construction Site Meetings: Participate in construction site meetings and review minutes, provide corrections or clarifications in writing to A/E of record, contractor and stakeholders.
22. Field Observations and Recording: Conduct 'field' observation tours as necessary but at least every two weeks to record first hand the progress of Construction. And notify State stakeholders upon awareness of a potential for increase in cost or delay of construction. 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.
23. Nonconforming Work: 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. Follow-up to ensure corrective work occurs.
24. Record Documents: 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

25. Schedule Development: Oversee the design-builder's development of the initial critical path method schedule to be coordinated with the initial cost model.
26. Project Schedule: Monitor and review the Project Schedule and all updates to the Project Schedule and will notify the State 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 owner, building tenants and State's Consultants.
27. Analyzing Claims for Time: Analyze claims for extensions of time and costs and coordinate with the A/E of Record to resolve.
28. Project phasing: Construction phasing will be an important aspect of this project so the OPR must monitor and review critical path analysis in order to determine the most effective and efficient sequencing of the construction work to minimize cost and disruption to the legislators, staff, public and ongoing state operations in the Capitol Building.
29. Schedule Review: Review and validate each update to the critical path method schedule prepared by the Design-Build Team.

COST

30. General Description: Establish and maintain a project financial status reporting system. Advise and make recommendations to stakeholders concerning the alternative courses of action to complete the project in the most economical manner possible including costs related efficiency, usable life, maintenance, energy, sustainability and operation.
31. Cost Research and Reviews: Conduct all cost research and reviews necessary for approving supplemental agreements (change orders).
32. Project Cost Summary Reports: The OPR will prepare and distribute Project Cost Summary Reports regularly throughout construction including updated cost information reflecting actual bid prices and construction costs versus current budget figures.
33. Development of Cost Model: Oversee the design-builder's development of the initial, conceptual master cost model in Construction Specifications Institute (CSI) format and the specific cost models associated with each of the design scoping workshops.
34. Cost Estimate: Prepare a cost estimate for SD, DD, and 40%, 70% and 90% CD

documents in CSI format.

35. Cost Resolution Workshops: Upon completion of each estimate, facilitate a two day cost estimate resolution workshop with the Design-Builder to review each line item of the two estimates to determine the final cost estimate for that particular item and phase of the project.

PROGRAM

36. Design Guidelines and Imperatives. Organize, facilitate, lead, and document (meeting minutes) development of Design Guidelines and Imperatives and Summary Documents (See Attachment A-2).
37. Design Scoping Workshops. Organize, facilitate, lead and document (meeting minutes) the Design Scoping Process (See Attachment A-3)
38. Conformance to Design Guidelines and Sustainability Guidelines: Monitor and manage the design of the building to assure the requirements of the Design Guidelines are met and the Sustainability Guidelines are followed.
39. Space Program: Review and validate space program documents prepared by the Design-Build team to ensure functional and other requirements are met in the most efficient and effective manner in accordance with State standards. Work closely with the building occupants to assure compliance with the Space Program, design-intent and adjacency relationships.
40. Space Planning Review: Review space plans for compliance with Budget, State purchasing rules and Space Guidelines.

SUPPLEMENTAL AGREEMENTS (CHANGE ORDERS)

41. Supplemental Agreements to the Contract: Review requests for changes, assist in negotiating proposals, and make recommendations to the State.
42. Supplemental Agreement (Change Order) Control: Establish and implement a supplemental agreement control system. Track all supplemental agreements and Proposal Letters and Requests For Information. Estimate the cost and time necessary for all Proposal Letter responses and make recommendations to the State prior to execution of supplemental agreements.
43. Supplemental Agreement and Contract Time Negotiations: The OPR will review time extensions due to a supplemental agreement. Make recommendations to the State on the acceptability of time extensions requested prior to the execution of any supplemental agreement.

PAYMENTS

44. Payment Applications: Review and make recommendations on all payment requests submitted by the State's Consultants, contractors and vendors. Review the payment requests submitted for accuracy and determine whether the amount requested

generally reflects the progress of the work. Recommend and facilitate appropriate adjustments to each payment application.

OCCUPANCY

45. Occupancy Permit: 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.
46. Occupancy and Move-in Activities: Prepare requests for proposals, solicit quotes, prepare contracts, conduct pre-move-in conferences and administer the contract for moving activities in conjunction with move-in .

PROJECT CLOSE-OUT

47. Punch List: In conjunction with the A/E of record, 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, advise stakeholders of completeness and will ensure a Certificate of Substantial Completion is issued by the A/E of record.
48. Final Completion: In consultation with the A/E of record, document and communicate when the work is finally completed and will ensure a Final Completion date is established.
49. Project Close-out Meeting: Thirty (30) calendar days prior to the established date of Final Acceptance, conduct a meeting with the customer agency and A/E of record to review maintenance manuals, guarantees and warranties, close-out submittals, bonds, and service contracts for materials and equipment.
50. Record Documents: Coordinate and expedite submittals of information for as-built preparation and will coordinate and expedite the transmittal of record documents to the user agency. The record documents will be submitted in electronic format and hardcopies.
51. Organize and Index Operation and Maintenance Materials: Prior to the Final completion of construction, ensure the receipt of material, such as manufacturer's operations and maintenance manuals, warranties, guarantees, etc., in an organized manner.
52. Training: 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

53. Bid Package Strategy: Review and advise the State on the appropriate bid packages to enable the construction of the Work to proceed in an efficient and cost effective manner.

54. Bid Package Review: Review all bid packages to ensure conformance with the contract and schedule and budget parameters.
55. Pre-bid conferences: Attend all prebid conferences for each bid package to monitor A/E clarifications to the construction documents.
56. Review and Evaluation: Assist the A/E of record to make recommendations to the State's PM on the award of contracts or rejection of bids.

END OF EXHIBIT A-1