



# Performance Work Statement GSA Schedule Task Order 871.7

for

## Construction Manager as agent (CMA) and Commissioning agent (CxA) Contract

### PROJECT IDENTIFICATION

Project Name: **West Palm Beach & Miami ReCx Project**

Project Number:

Region: 04

Building Name: **AUTEC Building (FL0095AC)  
Claude Pepper FB and Courthouse (FL0061ZZ)  
Paul Rogers FB and Courthouse (FL0066AC)**

Building Address: **AUTEC - 801 Clematis St., W. Palm Beach, FL, 33401  
Claude Pepper FB/CH 51 SW First Avenue Miami, FL 33130  
Paul Rogers FB/CH – 701 Clematis St., W. Palm Beach FL, 33401**

Contract Name:

Contract Number:

# 1 SUPPLIES OR SERVICES AND PRICES/COSTS

## 1.1 DESCRIPTION OF SERVICES

. The prices offered below are to cover all construction manager and commissioning agent services described in this solicitation, including management, supervision, labor, materials, supplies, and equipment (except as otherwise provided). See 2 Project Description for a complete description of the construction scope of work. See 2 and 3 for a detailed statement of CM services.

## 1.2 LUMP SUM PRICES OFFERED

The lump sum prices offered below are for CM services performed under the specific project phases shown. The lump sum price are to include all supervision, labor salaries, benefits, overhead, management, including materials, equipment, relocation costs, supplies, and profit (except as otherwise provided), for successful performance of all specified work, including the work performed by the CM's core staff, the CM's other employees, and the CM's consultants and subcontractors.

### Base (AUTECH)

AUTECH –

<b>Design Phase Services, Total</b>	\$ _____
<b>Construction Phase Services</b>	\$ _____
<b>Commissioning Services</b>	\$ _____
<b>Total Lump Sum Price</b>	\$ _____

(OPTION) Claude Pepper FB/CH –

<b>Design Phase Services, Total</b>	\$ _____
<b>Construction Phase Services</b>	\$ _____
<b>Commissioning Services</b>	\$ _____
<b>Total Lump Sum Price</b>	\$ _____

OPTION (Paul Rogers FB/CH)

<b>Design Phase Services, Total</b>	\$ _____
<b>Construction Phase Services</b>	\$ _____
<b>Commissioning Services</b>	\$ _____
<b>Total Lump Sum Price</b>	\$ _____

### **1.3 SUPPLEMENTAL INFORMATION**

Quotation shall provide, for evaluation (utilizing Form 2630 & 2631), the following information:

1. Number of hours per discipline for each type of service.
2. Separate item for travel per project phase

## **2 PROJECT DESCRIPTION**

The work includes the construction management (CMA) and commissioning services (CxA) during the design and construction of HVAC modifications at the AUTECH Building, 801 Clematis St., W. Palm Beach, FL, and an OPTION for the Claude Pepper FB/CH 51 SW First Avenue Miami, FL, and an OPTION for Paul Rogers FB and Courthouse, 701 Clematis St., W. Palm Beach, FL. including all design and construction documents, site investigation, demolition, site supervision, security approved workers, mechanical, electrical, painting, HVAC modifications.

### **2.1 Project Type**

This is a modernization project, as further defined in the Facility Standards for the Public Buildings Service. (See the Standards and Criteria Documents section under General Requirements below.)

### **2.2 Project Goals and Objectives**

The project goal is to provide CMA and CxA services during the HVAC upgrades to the AUTECH Building, an option for the Claude Peppers FB/Courthouse and, an option for the Paul Rogers FB/Courthouse while maintaining seamless operation, delivered on time and within budget.

### **2.3 Project Delivery Approach**

This construction project is a Design / Build contract based on the attached design development drawings and scopes. This CMA/CxA SOW is for the Construction Management and Commissioning support of that contract.

### **2.4 Reference Materials**

Design / Build Contract including applicable DID's and specifications.

## **3 GENERAL REQUIREMENTS**

This Statement of Work is organized according to the following breakdown of the project into major stages and phases:

- Design Stage
  - Design Development Phase
  - Construction Documents Phase
- Construction Stage
  - Construction Delivery Phase
  - Closeout Phase

The requirements set forth in this section apply to all stages and phases of the project as described in the Scope of Services section below. Some of the requirements of this section are subject to exercise of contract option(s).

### **3.1 Contract Parties and Contract Work**

The parties to this contract are the Contractor, hereinafter referred to as the Construction Manager as agent (CMA), and the United States Government. For purposes of this contract, the office representing the Government is the General Services Administration (GSA), Southeast Sunbelt Region, Public Buildings Service, hereinafter referred to as the GSA.

The individual authorized to act on the behalf of the GSA in the administration of this contract is the GSA Contracting Officer. The GSA Contracting Officer may delegate certain of his or her authorities to others, and if so, will notify the CMA in writing of the specific authorities delegated to, and limitations placed upon, named authorized representatives. The CMA shall not take any direction, or act upon any information, from individuals other than those having the requisite authority as confirmed by the GSA Contracting Officer's written notification.

The CMA is responsible to ensure that the GSA interests as the owner are well served. In this regard, the CMA shall assist the GSA in ensuring that the GSA requirements with regard to scope, schedule, budget, quality and other aspects of the project are met. The CMA shall serve as a facilitator and coordinator of the activities of all parties to ensure that the project execution proceeds according to plan. During the Design Stage, the CMA shall perform services relating to constructability, construction strategy and logistics, and budget control. The CMA shall also serve as the value engineering (VE) consultant. The specific activities, tasks, and deliverables required of the CMA are further delineated in this Statement of Work.

### **3.2 Professional Ethics and Standards of Practice**

In the conduct of all activities required for or otherwise related to the performance of the contract work, the CMA shall conform to and uphold all established ethical principles and professional standards of practice governing the CMA segment of the construction industry, including the Construction Management Association of America (CMAA) Code of Professional Ethics.

### **3.3 Project Delivery Team Roles and Responsibilities**

In the performance of the requirements of this contract, the CMA shall work in concert with other parties on the Project Delivery Team. The Project Delivery Team will include other contractors, the GSA personnel, customer agency representatives, and other stakeholders. The GSA will develop, periodically update, and maintain throughout the course of the project, a listing of the Project Delivery Team membership and respective roles and responsibilities. The other GSA-contracted major parties involved or to be involved in the Project Delivery Team, and their respective overall roles and responsibilities, are as follows:

The Design / Build Construction Contractor (DB) is responsible to design the project in accordance with the GSA owner's project requirements, budget, schedule, performance objectives, Scope of Services, and other requirements provided in the DB contract. The DB will also perform Construction

Stage and Tenant Occupancy Stage services to ensure that the design intent is refined and clarified as necessary during construction, realized in the completed facility, and conveyed successfully into facility management, operation and maintenance. The DB is responsible to perform the construction in accordance with the design plans, specifications and other requirements. The specific activities, tasks, and deliverables required of the DB are further delineated in the Design / Build contract documents. There may be multiple construction contracts and Construction Contractors employed on the project.

The GSA may engage other parties to perform specialized duties and requirements as appropriate for the project.

### **3.4 Owner's Project Requirements (OPR)**

The Design Stage services under this Statement of Work must comply with the GSA owner's project requirements (OPR) documentation provided in Appendix A. The owner's project requirements are provided as a general description of the project to begin initial design and include the preliminary space program for the tenant agency space.

### **3.5 Budget**

The estimated design and construction cost is \$1,600,000 for AUTECH, \$140,000 for Claude Pepper FB/CH and \$250,000 for Paul Rogers FB/CH

### **3.6 Schedule**

The anticipated project schedule is as follows:

#### **AUTECH:**

Design - 90 days

Construction - 330 days

Closeout - 30 days

#### **Claude Pepper FB/CH OPTION:**

Design - 30 days

Construction - 150 days

Closeout - 30 days

#### **Paul Rogers FB/CH: (OPTION)**

Design - 30 days

Construction - 180 days

Closeout - 30 days

### **3.7 CMA Team**

The CMA shall provide sufficient staff of project managers, field engineers, superintendents, engineers, inspection and testing engineers, scheduling engineers, cost engineers, clerical and accounting personnel, etc. to perform the required work.

### **3.8 Performance Objectives**

#### **3.8.1 Standards and Criteria Documents**

##### **3.8.1.1 Applicability**

All Design Stage services and related reviews must be conducted in accordance with the documents listed below. The applicable version of each document shall be the version current at the time of award of the DB contract. In the event of a conflict between the requirements stated in these documents and requirements provided elsewhere in this Statement of Work, the requirements in the Statement of Work will prevail.

##### **3.8.1.2 Document List**

PBS-P100, Facilities Standards for the Public Buildings Service, including all applicable standards, criteria and guides listed therein Design Stage DB submissions must comply with PBS-P100 Appendix A unless otherwise indicated in the DB contract.

PBS P-120, Project Estimating Requirements for the Public Buildings Service

Any conflicts or ambiguities within or among the referenced standards and criteria documents, or any deviations from requirements contained in the standards and criteria documents, must be reported to the GSA in writing, for determination as to applicability.

#### **3.8.2 Sustainable Design/LEED®**

N/A

#### **3.8.3 Fire Protection/Life Safety**

N/A

#### **3.8.4 Accessibility**

N/A

### **3.9 Project Management Responsibilities**

#### **3.9.1 Communications Plan**

The CMA, in consultation with the stakeholders of the project, shall assist the GSA in developing and complying with a project communications plan. This plan will be used and maintained throughout the project and modified as necessary to suit each project phase.

The CMA contractual responsibility is to the GSA only and not to other contractors, tenant agencies or local community interests where the project is located. The CMA shall direct all

questions and requests from tenant agencies and local community interests, and inquiries from potential offerors, to the GSA. Prior to contacting any parties other than the GSA regional personnel, the CMA shall confirm all meetings and/or communications with the GSA.

The CMA shall not release any oral, written or graphic information regarding this project to outside sources without obtaining prior consent from the GSA. All requests for information concerning the project must be referred to the GSA for response.

All presentations to non-GSA entities must be first approved by the GSA.

### **3.9.2 Project Progress Meetings/Presentations**

During the Design Stage, the CMA shall attend DB hosted project progress meetings, and/or presentations, with the GSA and primary tenant group heads as required to keep all parties apprised of the design progress/status and impending activities. These meetings may coincide with meetings/presentations required at various phases below under the Scope of Services. The CMA shall host special project technical meetings as needed involving Project Delivery Team technical disciplines.

During the Construction Stage, the DB will conduct and the CMA shall attend weekly progress meeting(s) and weekly subcontractor meeting(s). The CMA shall also attend construction oversight meetings with representatives from the GSA and the Project Delivery Team on a monthly basis. The CMA shall conduct site tours for the GSA and other officials as required.

Refer to the Scope of Services section below for detailed requirements for progress reporting.

### **3.9.3 Meeting Agendas, Attendance, Minutes and Correspondence**

The CMA shall prepare and distribute an agenda for each CMA hosted project meeting, in advance of the meeting date.

CMA representation at all meetings shall include those individuals having knowledge of the agenda topics and authority to make decisions and commit resources.

The CMA shall provide minutes of all CMA hosted project meetings and presentations to all attendees identifying new and unresolved old action items and associated responsible parties. Minutes must be provided within seven calendar days after each meeting.

The CMA shall reply to correspondence from the GSA, outside agencies, GSA contractors and construction subcontractors within 7 calendar days.

### **3.9.4 Design Quality Assurance**

The GSA requires that DB design submissions undergo three general types of design review: owner's review, codes and standards review, and constructability review. The GSA staff and GSA customer agencies will conduct reviews of all DB design submissions. The GSA OCA may also conduct independent quality assurance/quality control reviews of some DB design submissions. These GSA reviews will focus primarily on owner's review, but may also address codes and standards and constructability issues. In addition to the GSA reviews, the following design quality assurance services will be performed repeatedly during the Design Stage as further indicated under the Scope of Services below.

#### **3.9.4.1 Owner's Review**

The CMA shall perform owner's reviews and provide thorough and detailed written review comments. The purpose is to ensure that established functional, aesthetic and spatial requirements of the project are satisfied.

The CMA shall conduct owner's reviews to assure that:

- The design is responsive to the GSA program goals, objectives and priorities
- The completed facility can be efficiently operated and maintained
- The design adequately and efficiently accommodates the space program
- Interests of local community groups and other external stakeholders are considered and accommodated to the extent possible

In addition to the CMA owner's reviews, the CxA will perform focused commissioning design reviews as provided in the GSA PBS Building Commissioning Guide.

#### **3.9.4.2 Codes and Standards Review**

The CMA shall perform codes and standards reviews and provide thorough and detailed written review comments. The purpose is to ensure that the proposed design complies with applicable regulations, codes, and standards referenced in the standards and criteria documents listed above under performance objectives.

#### **3.9.4.3 Constructability Review**

The CMA shall perform constructability reviews and provide thorough and detailed written review comments. The purpose is to ensure that the design can be constructed within schedule and budget and that the sequencing of construction is planned for optimum efficiency.

The CMA shall conduct constructability reviews to assure that:

- The level of design complexity is consistent with the project's schedule and budget constraints.
- Materials, processes, equipment and labor are appropriate, available, non-proprietary and compliant with Buy American Act provisions.
- Construction work required is in conformance with standard construction practices, and equipment, products, materials, fixtures, etc. are readily available in the marketplace, to the maximum extent possible.
- Building systems are compatible and viable.
- Drawings and specifications are complete and thoroughly coordinated among disciplines.
- Defects, omissions, inconsistencies, conflicts, and ambiguities in documents are identified.
- Drawings are coordinated for multiple construction phases, if applicable.
- Site and building access, logistics, available storage and tenant occupancy requirements are accommodated.
- Existing conditions are shown correctly and adequately.
- Construction options and unit prices are logical, thoroughly described and understandable.
- Construction details are appropriate, complete, thoroughly described and workable.
- General requirements items are thorough and properly addressed.
- Construction documents and construction phasing provide for continuous use of all building systems (including phone, data, fire alarm, security etc.) during all construction.
- Construction duration and phasing of bid packages is reasonable.



#### **3.9.4.4 Design Review Procedures**

The CMA shall coordinate all design reviews, conduct owner's, codes and standards, and constructability reviews, and prepare design review reports. For the DB final design concept submission and each subsequent design submission from the DB, the CMA shall coordinate with the reviewing parties as necessary to reconcile any conflicting comments and consolidate all reconciled design review comments into a single design review report including the CMA, the CxA, and the GSA review comments.

The CMA shall assist in ensuring that all comments are resolved to the GSA satisfaction. For each DB design submission after the final design concept submission, the CMA shall check the submission to ensure that all comments on the prior submission have been incorporated or otherwise addressed, and shall include a summary of any unresolved comments in the design review report.

Prior to the first scheduled design review, the CMA shall prepare and submit to the GSA for approval a procedure for conducting all design reviews required under this contract. The procedure must include a list of participants, the responsibilities of participants, the physical location of design reviews, and a detailed schedule of review activities consistent with the review and response times specified below:

- All reviewing parties are required to return comments no later than 7 calendar days prior to the end of the corresponding review period shown in the Design Stage Activity, Review, and CMA Fee Table in the Administration section below.
- The CMA shall prepare and submit the design review report within 7 calendar days after comment due date.
- The DB is required to respond in writing to the design review comments within 14 calendar days after receipt of the design review report.

### **3.10 Electronic/Print Media**

#### **3.10.1 CAD Standards**

Starting with the design development submission all drawing materials provided by the DB to the CMA will be in accordance with the GSA PBS computer aided design (CAD) standards. The CMA must have the capability to receive, review and edit CAD file drawing materials. Any drawing materials provided by the CMA also must conform to the GSA PBS CAD standards. Go to <http://www.gsa.gov/cifm> for requirements.

#### **3.10.2 Other Electronic Documents**

In addition to any hardcopy submission requirements, all design submissions must also be submitted in an electronic format. All electronic media must be in a form readable by standard office automation applications.

### **3.11 CMA Personnel Security Requirements**

All CMA Personnel are subject to the requirements of Homeland Security Presidential Directive – 12. This includes but is not limited to submission of all required information for back ground security checks, fingerprints cards, and other local agency checks.

#### **3.11.1 Subcontracts**

The CMA shall incorporate provisions in all applicable CMA subcontracts as necessary to ensure compliance with all requirements provided in this CMA Personnel Security Requirements section.

## **3.12 Document Security**

Sensitive but unclassified (SBU) building information will be generated and/or must be disseminated to and stored by various parties in the course of executing this project. SBU building information is information that, if misused, poses a potential security risk to a building, its occupants and visitors, and/or its contents. The CMA shall comply with the following requirements regarding SBU building information.

### **3.12.1 Documents**

As used in this section, the term “documents” means any media or devices used to capture, store, and transmit information, including printed images and electronically or optically stored forms of graphic and written information, as well as physical or virtual models.

### **3.12.2 Identification and Labeling/Marking**

Original CMA generated documents that contain building information must be reviewed with the GSA to identify any SBU content, before the original or any copies are disseminated to any other parties. If SBU content is identified, the CMA shall affix SBU document labels/markings to the original documents and all extant copies, as instructed by the GSA, prior to any dissemination.

### **3.12.3 Copying from Labeled/Marked Documents**

Any documents containing SBU content copied from SBU labeled/marked documents must have the same SBU labels/markings affixed, unless the copies are redacted and reviewed as provided below.

### **3.12.4 Redacting**

The CMA may redact complete or partial copies of SBU labeled/marked documents to remove or completely and unalterably obscure the SBU content. The CMA shall review the redacted copies with the GSA to ensure that all SBU content has been removed or obscured. Copies so redacted and reviewed are no longer subject to these requirements regarding SBU building information.

### **3.12.5 Safeguarding and Storage**

The CMA shall properly safeguard any documents bearing SBU labels/markings at all times while those documents are in CMA possession. ADBess to such documents when in use by the CMA must be limited to individuals having a need to know the content in order to perform work required under this contract. When not in use, SBU labeled/marked documents in CMA possession must be securely stored such that they can be retrieved only by those individuals having a need to know the content.

### **3.12.6 Dissemination**

Other than within the Project Delivery Team, the CMA shall disseminate SBU labeled/marked documents only to parties assigned or authorized to perform a role in the execution of the project and having a resultant need to know the document content. Documents may be disseminated in face-to-face meetings, by courier or secure shipment with evidence of delivery, or by electronic transmission. Electronic transmission of SBU information shall be encrypted as provided in current National Institute of Standards and Technology (NIST) data encryption standards and cryptographic module security requirements for processing SBU information.

### **3.12.7 Destruction**

SBU content that is no longer needed shall be purged from all SBU labeled/marked documents and destroyed, or the complete document shall be destroyed, such that the SBU content is rendered unreadable and incapable of being restored. Data storage devices containing SBU

information that is no longer needed shall be destroyed or the SBU content shall be erased using a permanent erase utility or comparable method.

### **3.12.8 Reporting**

The CMA immediately shall report to the GSA any known or suspected instances of improper dissemination of SBU information, or other circumstances in which the security of SBU information may be compromised.

### **3.12.9 Subcontracts**

The CMA shall incorporate provisions in all applicable subcontracts as necessary to ensure compliance with all requirements provided in this Document Security section.

### **3.13 Record Keeping**

The CMA is responsible for preparing correspondence and other documentation and maintaining accurate and detailed records of the project's progress during each phase. The CMA is responsible to maintain records so as to facilitate document storage and retrieval. Refer to the Scope of Services section below for detailed requirements for project documentation.

### **3.14 Construction Submittal and RFI Processing**

On behalf of the GSA, the CMA is responsible to manage and document the processing of the DB submittals and requests for information (RFI's). Refer to the Scope of Services section below for detailed requirements for submittal and RFI processing.

## 4 CMA SCOPE OF SERVICES

The CMA shall perform all services described in this Scope of Services (including services required under exercised options, if any) in accordance with applicable requirements and provisions set forth in the General Requirements section above.

### 4.1 Pre-Design Stage

No CMA services required.

### 4.2 Design Stage

#### 4.2.1 Design Concept Phase

No CMA services required.

#### 4.2.2 Construction Documents (CD) Phase

The entire project scope as described in Section 1

##### 4.2.2.1 In-Progress CD (50% Design) Submission – FOR AUTECH ONLY

Assist the DB in preparation of an in-progress construction specification, in particular, Division 1 General Requirements sections emphasizing project phasing, DB requirements and preliminary project-specific construction management issues.

Verify the design submission against submission requirements provided in the DB contract.

Confirm that changes have been made as indicated in the DB responses to the reconciled review comments from the previous submission.

Check the submission to confirm incorporation of accepted VE proposals.

Coordinate and schedule delivery of the design submission to all Project Delivery Team members for review.

##### 4.2.2.2 In-Progress CD Reviews

No CMA services required.

##### 4.2.2.3 Pre-Final CD Coordination

No CMA services required.

##### 4.2.2.3.1 Pre-Final CD (100% Design) Submission – For AUTECH ONLY

Assist DB in preparation of a pre-final construction specification, in particular, Division 1 General Requirements sections emphasizing project phasing, DB requirements and project-specific construction management issues.

Verify the design submission against submission requirements provided in the DB contract.

Confirm that changes have been made as indicated in the DB responses to the reconciled review comments from the previous submission.

Coordinate and schedule delivery of the design submission to all Project Delivery Team members for review.

#### **4.2.2.4 Pre-Final CD Reviews**

No CMA services required.

##### **4.2.2.4.1 Construction Specification**

Review and comment on the construction specification, including subcontractor qualifications, submittal requirements, testing, adjusting and balancing specifications, training requirements and O&M and system manual requirements.

#### **4.2.2.4.2 Final CD (100% Design) Submission - For AUTECH, Claude Pepper, and Paul Rogers Buildings**

Assist DB in preparation of a final construction specification, in particular, Division 1 General Requirements sections emphasizing project phasing, DB requirements and project-specific construction management issues.

Verify the design submission against submission requirements provided in the DB contract.

Confirm that changes have been made as indicated in the DB responses to the reconciled review comments from the previous submission.

Provide a cost estimate to verify that the design can be constructed within the baseline construction budget.

Review the DB and the GSA cost estimates and perform cost estimate reconciliation.

Coordinate and schedule delivery of the design submission to all Project Delivery Team members.

### **4.3 Construction Stage**

#### **4.3.1 Construction Delivery Phase**

##### **4.3.1.1 Construction Start Coordination**

###### **4.3.1.1.1 Pre-Construction Conference**

Facilitate and assist in conducting the pre-construction conference. In coordination with the GSA, schedule the meeting, prepare and distribute the agenda, and record and distribute meeting minutes.

##### **4.3.1.2 Construction Administration**

###### **4.3.1.2.1 Construction Stage Recordkeeping**

Maintain at the job site, on a current basis, contract records including copies of all correspondence, submittals, progress reports, and related documentation throughout the duration of construction. The records shall be organized and maintained so they are easily accessible. Such files will be turned over to the GSA for record purposes prior to close out of the CMA contract. Examples of files to be maintained are:

- Correspondence
- Annotated submittals
- Formal and pending contract modifications with documentation
- Value engineering change proposals
- Claims and supporting documentation
- Minutes from progress meetings
- Approved payment vouchers
- Documentation of significant clarifications and decisions
- Inspection and progress reports
- Monthly status reports
- Safety plans and incident reports

#### **4.3.1.2.2 Construction Progress Reporting**

Keep accurate and detailed written records of project progress during all phases of construction and prepare progress reports in the format and frequency required by the GSA. Maintain a detailed daily diary of all events, which occur at the job site or elsewhere, which affect or may be expected to affect project progress. The GSA will provide or approve formats for periodic status reports, including daily diaries, logs, photo documentation requirements, weekly reports, monthly status reports, etc. All reports must be available to the GSA at all times and are to be turned over to the GSA on completion of this contract.

Prepare and submit weekly reports to the GSA on the status of construction, including updated copies of all logs maintained at the site for change orders, claims, submittals, etc. Submit monthly reports on or before the 5th working day of each month including the following information:

- Percentage of construction in place, planned and actual
- Summary budget status
- Inspection report, list of deficiencies and omissions
- Summary of outstanding problems/issues
- Summary of issues resolved, decisions reached, clarifications, instructions, etc.
- Summary report on submittals
- Progress photos
- Minutes from meetings during the month
- Jobsite safety evaluation, including an incident report summary

#### **4.3.1.2.3 Construction Safety Program**

Review the DB safety and health plans and programs to ensure conformance with applicable regulatory requirements and DB contract provisions.

Participate in an initial safety meeting with the Project Delivery Team.

Attend DB periodic safety meetings.

Verify that site safety and health is managed in accordance with the applicable regulatory requirements and DB contract provisions.

Immediately advise the DB and the GSA of:

- any observed instance of DB (including DB subcontractors) non-compliance with the employee OSH program

- any safety hazards observed
- any instances of DB non-compliance with applicable regulatory requirements and DB contract provisions
- any construction-related fatalities
- any construction-related incidents resulting in emergency hospitalization of one or more persons
- any site inspection or request for a site inspection by any federal, state or local safety, health or environmental authority

Verify that the DB completes and provides a copy of all required OSHA Forms 301 (or similar), Injury and Illness Incident Reports, to the GSA.

Document the proceedings of any safety and health related meetings with federal, state or local authorities, and provide a copy to the GSA.

Cooperate with officials of other agencies (federal, state, local) who are vested with authority to enforce requirements of the OSH Act.

#### **4.3.1.2.4 Progress Meetings**

The CMA shall participate with the GSA in DB progress meetings.

#### **4.3.1.2.5 Construction Schedules**

The DB will provide and maintain construction schedules in accordance with the requirements provided in Division 1 of the construction specification.

The CMA shall review the DB schedules for completeness and appropriateness and recommend approval, rejection, or revisions to the GSA.

The CMA shall continuously monitor actual progress against the master project schedule, identify any delays or potential delays and immediately notify the GSA of such delays or potential delays.

#### **4.3.1.2.6 Submittal Processing**

Formalize the GSA approval of procedures to support the processing of DB submittals, including guidelines for timely and necessary action by all involved parties. Ensure that all involved parties understand and agree to their respective roles, responsibilities, and timeliness requirements.

Maintain a log of all DB submittals and to manage the process of submittal review and approval. Check each submittal for adequacy and completeness, and refer incomplete or inadequate submittals back to the DB for further correction and resubmittal. Forward adequate and complete submittals to the DB, and the GSA for response. Follow up with the DB and the GSA to ensure timely responses.

Organize and store approved submittal samples and oversize shop drawing for reference during construction and for turn-over to the GSA at close-out.

Ensure that the DB makes all submittals required in accordance with the submittal schedule and that all submittals are timely, complete and correct before they are forwarded for review.

Expedite the processing of submittals to minimize approval times.

Coordinate resolution of all rejected submittals, including RFI's required from the DB for submittals proposing deviations from contract requirements.

#### **4.3.1.2.7 Inspections and Testing**

Throughout the Construction Delivery Phase the CMA shall assist the GSA in coordinating and monitoring the inspections performed by the DB, CxA, and the DB.

Verify that the construction work is done in conformance with the contract documents and approved submittals. Promptly report to the DB, in writing, observed variances from the contract requirements with a copy to the GSA, and advise the GSA if the DB fails to promptly remove, correct, or replace unacceptable construction work. Assess any resulting delays caused by the DB.

Monitor DB required testing and assure test results are submitted to the GSA. Review construction contract requirements to identify all tests that are required to be performed by the DB and verify the DB testing schedule for completeness. CMA responsibilities include:

- Verifying that tests are conducted as scheduled
- Witnessing major tests
- Checking test results
- Retaining test records
- Summarizing significant test results in progress reports
- Notifying the GSA of test failures and planning corrective actions
- Overseeing corrective actions and retesting
- Coordinating independent testing and inspection of commissioned building systems and equipment with the CxA

Assure that the DB coordinates with local municipal officials for inspections.

#### **4.3.1.2.8 As-Built Drawings and Specifications**

The DB will update CAD drawings (as-built drawings) and electronic specifications (as-built specifications), at least monthly, to document changes that occur during construction.

The CMA shall verify on a monthly basis that the DB is maintaining a complete, accurate, and up-to-date set of CAD as-built drawings and electronic specifications.

#### **4.3.1.2.9 Clarifications/Requests for Information**

Formalize and secure the GSA approval of procedures to process DB requests for information (RFI's), including guidelines for timely and necessary action by all involved parties. Ensure that all involved parties understand and agree to their respective roles, responsibilities, and timeliness requirements.

Maintain a log of all DB requests for information (RFI's), and to manage the process of resolving RFI's and documenting resolution. Review each RFI for validity and adequate specificity, and refer questionable RFI's back to the DB for further consideration. Forward valid and specific RFI's to the DB and the GSA for response. With each RFI forwarded, include a recommendation as to whether revised or additional design documentation is required. Follow up with the DB and the GSA to ensure timely responses.



Confirm that all parties agree with the contract interpretation provided in each RFI response, including the GSA determination of whether the response constitutes a clarification with no cost or schedule impact, or requires an adjustment of the price and/or the performance time in the DB contract.

If issues requiring clarification of DB contract requirements arise and are resolved by any means other than use of the ePM system, ensure that such issues and their resolution are recorded in the ePM system, such that the ePM system will contain a complete record of all RFI's and their resolution.

Formalize and secure the GSA approval of procedures for processing contract modifications, including guidelines for timely and necessary action by all involved parties. Ensure that all involved parties understand and agree to their respective roles, responsibilities, and timeliness requirements.

Prepare the GSA Form 2437, Findings of Fact for Contract Modification, including rationale, cost estimates, and revised documentation, as necessary to resolve RFI's or support contract modification.

#### **4.3.1.2.10 Payment Requests**

Review advance copies of the DB construction progress reports.

Make written recommendation to the GSA on approval of progress payment amounts.

#### **4.3.1.2.11 Management of Construction Contingency Allowance**

Provide recommendations and supporting cost estimates for all proposed modifications to the DB contract (change orders).

### **4.3.1.3 Turnover Process**

#### **4.3.1.3.1 Substantial Completion**

Prior to substantial completion, assist the GSA in conducting a pre-final walk-through with tenant agencies.

Assist the GSA in determining substantial completion.

#### **4.3.1.3.2 Punch-List**

After the GSA certification that the work or each designated portion thereof is substantially complete, assist the GSA in conducting a final inspection and preparing a punch-list documenting remaining work.

Participate with the GSA in conducting follow-up inspections to administer resolution of punch-list items, involving the DB, the DB, tenant agencies and other stakeholders as appropriate.

#### **4.3.1.3.3 Operation and Maintenance (O&M) Manuals**

*[Edit below for regional preference of hardcopy vs. CD or electronic document submittal requirement.]*

Review and recommend acceptance, revision or rejection of O&M manuals.

#### **4.3.1.3.4 Warranties, Guarantees and Certificates**

Review all submitted warranties, guarantees, and certificates, ensuring that the GSA rights and responsibilities are clearly defined.

**4.3.1.3.5 Final As-Built Drawings and Specifications**

Review the DB final as-built drawings and specifications and recommend approval or disapproval by the GSA.

**4.3.1.3.6 Material Samples, Attic Stock and Spare Parts**

Receive and inventory attic stock required from the DB, coordinating storage with the GSA property management.

**4.3.2 Closeout Phase**

**4.3.2.1 DB Final Record Documents**

The DB will produce final record documents, based on the DB as-built drawings and specifications, to reflect all contract modifications and noted field conditions.

The CMA shall monitor the development of DB record documents to ensure that they conform to the GSA PBS CAD standards.

**4.3.2.2 GSA CAD Library Coordination**

No CMA services required.

**4.3.2.3 Construction Contract Closeout**

Assist in resolving all remaining punch-list items.

Assist the GSA in establishing a final breakdown of the total construction contract amount into a core and shell component and TI and security components for each tenant (i.e. each client billing record).

**4.3.2.4 Final Project Photographs**

Provide photographs of final installation.

## 5 CxA SCOPE OF SERVICES

The CMA shall provide commissioning services through a Commissioning Agent (CxA). CxA shall perform all services described in this Scope of Services (including services required under exercised options, if any) in accordance with applicable requirements and provisions set forth in the General Requirements above.

### 5.1 Pre-Design Stage

No CxA services required.

### 5.2 Design Stage – See CMA Requirements for Each Individual Building

#### 5.2.1 Design Stage Commissioning

##### 5.2.1.1 Commissioning Record Outline

Prepare and submit an outline for development of the commissioning record to be assembled over the course of design and construction. The commissioning record outline shall include sections for the following:

- Commissioning plan, including testing and inspection plan
- Commissioning schedule
- Owner's project requirements (OPR)
- Design narratives (BoD)
- Design review reports
- Commissioning meeting minutes
- Commissioning specifications
- Commissioning issues log
- Coordination drawings
- Testing and inspection procedures
- System start-up plans
- Construction checklists
- Inspection reports
- Test reports
- Commissioning test certifications
- Training plans
- Training documentation
- Deferred testing documentation
- Post-construction review/reinspection report

##### 5.2.1.2 Design Stage Commissioning Plan Updates

Update and refine the commissioning plan (based on the GSA preliminary commissioning plan) during the Design Stage as described in the GSA PBS [Building Commissioning Guide](#). At each phase within the Design Stage, prepare and submit an updated commissioning plan based on the corresponding level of design development.

##### 5.2.1.3 Design Stage Commissioning Coordination Meetings

Conduct Design Stage commissioning coordination meetings with the Project Delivery Team.

#### **5.2.1.4 Owner's Project Requirements (OPR)**

At each phase within the Design Stage, review and update the OPR documentation for additional detail and clarity.

Assist the DB Contractor in incorporating the results of the OPR review in the design narratives accompanying each design submission. The design narratives will serve as the basis of design (BoD) as referenced in the GSA PBS Building Commissioning Guide.

#### **5.2.1.5 Design Stage Commissioning Issues Log**

Maintain a master log of Design Stage commissioning issues. Report all issues through the CxA as they occur. Provide written progress reports with recommended actions.

Assist the GSA in assuring resolution of issues in the commissioning issues log.

Document in the issues log the resolution of all Design Stage commissioning issues.

### **5.2.2 Design Concept Phase**

#### **5.2.2.1 Design Concept Coordination**

##### **5.2.2.1.1 Partnering Session**

No CxA services required.

##### **5.2.2.1.2 Program Review Meeting(s)**

No CxA services required.

#### **5.2.2.2 Preliminary Design Concept Submission**

No CxA services required.

#### **5.2.2.3 Design Concept VE Workshop**

No CxA services required.

#### **5.2.2.4 Final Design Concept Submission**

Assist the DB Contractor in preparing the design narrative for inclusion in the final design concept submission.

#### **5.2.2.5 Baseline Construction Budget Cost Breakdowns**

No CxA services required.

#### **5.2.2.6 Final Design Concept Commissioning Activities**

Conduct a focused commissioning design review of the final design concept submission.

Prepare and submit the updated OPR documentation for additional detail and clarity.

Prepare and submit the updated commissioning plan.

#### **5.2.2.7 Final Design Concept Presentations**

No CxA services required.

#### **5.2.2.8 HVAC Quality Assurance Review**

Participate in a HVAC quality assurance review meeting. Design Development (DD) Phase

**5.2.2.9 DD Coordination**

**5.2.2.9.1 DD Program Review Workshop**

No CxA services required.

**5.2.2.9.2 DD Systems Selections Analysis Meetings**

No CxA services required.

**5.2.2.9.3 DD Analyses and Calculations**

No CxA services required.

**5.2.2.9.4 DD Interdisciplinary Coordination Review Meeting**

No CxA services required.

**5.2.2.9.5 DD BIM Requirements**

No CxA services required.

**5.2.2.10 Construction Work Sequence Planning**

No CxA services required.

**5.2.2.11 Construction Market Survey**

No CxA services required.

**5.2.2.12 HVAC Quality Assurance Review**

Participate in a HVAC quality assurance review meetings at all design stages.

**5.2.2.13 DD Mockups and Tests**

Assist in identifying and defining requirements for physical and virtual mockups as necessary to facilitate design stage systems testing.

**5.2.2.14 Design Stage Systems Testing**

Witness performance of the tests and review and comment on the resulting test reports:

**5.2.2.14.1 Computational Fluid Dynamics (CFD) Modeling**

No CxA services required.

**5.2.2.14.2 Water Penetration Test**

No CxA services required.

**5.2.2.14.3 Other Design Stage Systems Tests**

No CxA services required.

**5.2.2.15 DD (50% Design) Submission**

Assist the DB Contractor in preparation of draft construction specifications for DB self-performed work and subcontracts, including Division 1 General Requirements and other sections emphasizing DB Contractor testing/commissioning requirements.

Assist the DB Contractor in updating the design narrative for inclusion in the DD submission.

**5.2.2.16 DD Commissioning Activities**

Conduct a focused commissioning design review of the DD submission.

Prepare and submit the updated OPR documentation for additional detail and clarity.

Prepare and submit the updated commissioning plan.

**5.2.2.17 DD VE Workshop**

No CMA services required.

**5.2.2.18 Design Stage Commissioning Record**

After all Design Stage work is complete, prepare and submit a Design Stage commissioning record. Include the design stage commissioning issues log documenting resolution of all commissioning issues identified.

**5.2.3 Construction Documents (CD) Phase**

**5.2.3.1 CD Phase Commissioning**

**5.2.3.1.1 Commissioning Specifications**

Develop commissioning specifications for all commissioned equipment, and coordinate with DB Contractor in integrating the commissioning specifications into the construction specifications for DB Contractor self-performed work and subcontracts.

Review project specifications for contractor qualifications, submittal requirements, testing, adjusting and balancing specifications, training requirements and O&M and systems manual requirements.

**5.2.3.1.2 Systems Manual Outline**

Prepare and submit an outline for development of the systems manual to be assembled over the course of construction and provided as a comprehensive guide for operation, maintenance, management, and periodic re-commissioning of the completed facility. The systems manual outline shall include, at a minimum, sections for the following:

- Training procedures and manuals for operating personnel, including training videos
- Operation and maintenance (O&M) manuals
- Warranties
- Record documents (drawings and specifications)
- Building preservation plan/guidelines
- Computerized maintenance management system (CMMS) administration and user guides
- Re-commissioning manual

**5.2.3.1.3 Testing and Inspection Plan**

Develop a testing and inspection plan, defining all special testing requirements and procedures, to be coordinated with and reflected in the construction specifications and Construction Delivery Phase commissioning services contract. Include sample percentages for testing of high-count multiple equipment items not to be 100 percent tested. Incorporate the plan as an appendix update to the commissioning plan.

Assist the GSA in the development of the Construction Delivery Phase commissioning services scope of work.

**5.2.3.1.4 Owner's Project Requirements (OPR) - CD Update**

Update and refine the OPR for additional detail and clarity based on CD Phase decisions.

Assist the DB Contractor in incorporating the results of the OPR review in the design narratives accompanying the CD submissions.

**5.2.3.2 Baseline Construction Budget Cost Breakdowns**

No CxA services required.

**5.2.3.3 CD Coordination**

**5.2.3.3.1 CD Program Review Workshop**

Participate in a program review workshop prior to the start of CD.

**5.2.3.3.2 CD Program Review Meetings**

Prior to the start of CDs, participate in program review meetings.

**5.2.3.3.3 CD Coordination (Special Tasks)**

Participate in a CD Phase coordination meeting to address envelope integrity in detailing plans and developing specifications to ensure envelope thermal and moisture integrity.

Assist the DB Contractor in identifying all manufacturer recommended operating, maintenance and cleaning practices for major features, systems and equipment, and coordinating with the GSA/tenant agency property management officials to define specification requirements for service agreements, warranties, and turnover-related training.

Ensure that the DB Contractor addresses integration of safety/security/building automation systems and controls, both internal and external (remote) to the building.

Assist the DB Contractor in defining project related telecommunications infrastructure work within the construction specification, and coordinating with the GSA and impacted tenant agencies.

**5.2.3.3.4 In-Progress CD Interdisciplinary Coordination Review Meeting**

Prior to the first in-progress CD submission, participate in an interdisciplinary Project Delivery Team review.

**5.2.3.4 In-Progress CD (50% Design) Submissions – AUTECH ONLY**

Assist the DB Contractor in preparation of in-progress construction specifications for DB self-performed work and subcontracts, including Division 1 General Requirements and other sections emphasizing DB Contractor testing/commissioning requirements.

Assist the DB Contractor in updating the design narrative for inclusion in the in-progress CD submissions.

**5.2.3.5 In-Progress CD Commissioning Activities**

No CMA services required.

**5.2.3.6 Pre-Final CD Coordination**

Prior to the first pre-final CD submission, participate in an interdisciplinary Project Delivery Team review meeting.

Conduct a controls integration meeting where all involved disciplines and stakeholders ensure that integration issues and responsibilities are clearly described in the specifications.

**5.2.3.7 Pre-Final CD (100% Design) Submissions – AUTEK ONLY**

Assist the DB Contractor in preparation of pre-final construction specifications for DB self-performed work and subcontracts, including Division 1 General Requirements and other sections emphasizing DB Contractor testing/commissioning requirements.

Assist the DB Contractor in updating the design narrative for inclusion in the pre-final CD submissions.

**5.2.3.8 Pre-Final CD Commissioning Activities**

Conduct a focused commissioning design review of the pre-final CD submissions.

Prepare and submit the updated OPR documentation for additional detail and clarity.

Prepare and submit the updated commissioning plan.

**5.2.3.8.1 Construction Specifications**

Review and comment on the construction specifications, including subcontractor qualifications, submittal requirements, testing, adjusting and balancing specifications, training requirements and O&M and systems manual requirements.

**5.2.3.9 Final CD (100% Design) Submissions – AUTEK, Claude Pepper, and Paul Rogers Buildings**

Assist the DB Contractor in preparation of final construction specifications for DB self-performed work and subcontracts, including Division 1 General Requirements and other sections emphasizing DB Contractor testing/commissioning requirements.

Assist the DB Contractor in updating the design narrative for inclusion in the final CD submissions.

**5.2.3.10 Final CD Commissioning Activities**

Make any needed adjustments to the OPR and commissioning plan for additional detail and clarity based on the final CD submissions.

**5.3 Construction Stage**

**5.3.1 Construction Delivery Phase**

**5.3.1.1 Construction Start Coordination**

**5.3.1.1.1 Pre-Construction Conference**

Participate in a pre-construction conference.

**5.3.1.2 Construction Administration**

**5.3.1.2.1 Construction Schedules**

Review the DB Contractor construction schedule to ensure proper integration of commissioning activities.

**5.3.1.2.2 Submittal Processing**

Review and comment on the DB Contractor submittal schedule.



Coordinate with the DB Contractor and the CxA to receive all required shop drawings and product/equipment submittals affecting commissioned systems, equipment, and other commissioned building features.

Review and comment on all project submittals received.

**5.3.1.2.3 Inspections and Testing**

Throughout the Construction Delivery Phase the CxA will assist the GSA in coordinating and monitoring the inspections and tests performed by the DB Contractor and the CxA.

The CxA will coordinate CxA independent testing and inspection of commissioned building systems and equipment with the CxA.

**5.3.1.2.4 Clarifications/Requests for Information**

Receive and review DB Contractor requests for clarification/RFI's as requested by the CxA and/or the GSA. Within 7 calendar days after receipt, return written responses including any additional documentation needed to clarify requirements or provide further information.

**5.3.1.2.5 DB Contractor As-Built Drawings and Specifications**

Assist the DB Contractor in updating CAD construction drawings (as-built drawings) and electronic specifications (as-built specifications) to document changes that occur, or unforeseen conditions impacting delivered work during construction.

**5.3.1.3 Construction Delivery Phase Commissioning**

During the Construction Delivery Phase, the DB Contractor will be required to coordinate its testing, inspection and quality assurance activities with the CxA independent testing, inspection and verification. Elements of the DB Contractor quality control plan for all systems, assemblies and equipment may overlap elements of the commissioning requirements which shall be independently verified by the CxA.

**5.3.1.3.1 Construction Delivery Phase Commissioning Plan Updates**

Update and refine the commissioning plan, defining all Construction Delivery Phase commissioning roles and responsibilities specific to testing and inspection of commissioned systems and building features and performance of special testing. Maintain and update the commissioning plan, including revisions required to keep the commissioning plan current throughout the Construction Delivery Phase. Submit monthly updates of the commissioning plan throughout the Construction Delivery Phase.

**5.3.1.3.2 Commissioning Schedule**

Maintain and update a commissioning schedule, coordinating the commissioning work with the Project Delivery Team to ensure that commissioning activities are being incorporated.

**5.3.1.3.3 Construction Delivery Phase Commissioning Coordination**

Schedule and conduct regular commissioning coordination meetings with the Project Delivery Team.

**5.3.1.3.4 Systems Coordination Plans**

Review and comment on the CC systems coordination plans.

**5.3.1.3.5 Commissioning Testing and Inspection Procedures**

Request and review additional information required to perform commissioning tasks, including O&M materials and contractor start-up and checkout procedures. Before systems start-up, coordinate with contractors and design engineers to obtain information and clarity on control sequences and interlocks as necessary to develop detailed testing procedures and an enhanced systems start-up and initial systems checkout plan.

Prepare and submit step-by-step commissioning test procedures for commissioned systems, including pre-functional test (PFT) procedures, functional performance test (FPT) procedures, and documentation forms and construction checklists for all commissioned equipment and assemblies. Test procedures shall include manual functional testing and energy management control system trending and may include stand-alone data-logger monitoring.

Prepare and submit an enhanced start-up and initial systems checkout plan with contractors for commissioned equipment.

#### **5.3.1.3.6 Construction Checklists**

Verify DB Contractor completion of construction checklists as the work is accomplished.

#### **5.3.1.3.7 Commissioning Testing and Inspection**

Perform/witness independent commissioning testing and inspection, may include but not be limited to the following tests:

- Sequence testing of HVAC central plant, condenser water system, and air distribution
- Building pressurization test
- Refrigeration/heating/air handling load tests
- HVAC system controls
- Thermographic scan
- Tracer gas test
- Testing Adjusting and Balancing tests

Perform/witness retesting and reinspection as required if initial testing and inspection indicates performance deficiencies.

Coordinate the scheduling of off-site testing (such as blast), and mockups. Prepare and submit special testing reports, as appropriate, for building diagnostics tests of critical components and systems.

Verify proper installation of commissioned components and systems.

Incorporate subcontractor functional testing records for commissioned systems and assemblies, provided by the DB Contractor, in the commissioning record.

#### **5.3.1.3.8 Commissioning Inspection Reports**

Perform site visits, as necessary, to observe commissioned component and system installations and inspection checklist completion. Attend job-site meetings to obtain information on construction progress relative to commissioned systems. Review construction meeting minutes for revisions/substitutions relating to the commissioning process and assist in resolving any discrepancies.

Witness demonstrations of commissioned systems operations and prepare commissioning inspection reports.

Approve air and water systems balancing by spot testing, by reviewing completed reports, and by selected site observation.

Coordinate functional testing for all commissioned systems and assemblies. Witness and document manual functional performance tests performed by the DB Contractor for all commissioned systems and assemblies.

**5.3.1.3.9 Commissioning Test Certifications**

Assemble and review all commissioning test certifications as described in the testing and inspection procedures, for incorporation in the commissioning record.

**5.3.1.3.10 Commissioning Issues Log**

Maintain a master issues log and a separate record of functional testing. Report all issues through the CxA as they occur. Provide written progress reports and test results with recommended actions.

Assist the GSA in assuring resolution of failures reported in the commissioning issues log.

Document in the issues log the resolution of all issues identified.

**5.3.1.4 Turnover Process**

**5.3.1.4.1 Punch-List**

Review the punch-list documenting remaining work.

Participate with the GSA in conducting follow-up inspections to administer resolution of punch-list items, involving the CxA, the DB Contractor, tenant agencies and other stakeholders as appropriate.

**5.3.1.4.2 Operation and Maintenance (O&M) Manuals**

The DB Contractor will prepare O&M manuals that clearly explain design intent, system and equipment operation, calibration requirements, and maintenance procedures, all as required in the systems manual outline. GSA may require both a hard copy and CD / electronic document submission.

Incorporate the GSA approved O&M manuals into the systems manual.

**5.3.1.4.3 Warranties, Guarantees and Certificates**

Incorporate all warranties, guarantees and certificates into the systems manual.

**5.3.1.4.4 Final As-Built Drawings and Specifications**

Review and comment on the DB Contractor final as-built drawings and specifications.

**5.3.1.4.5 Preparation for Occupancy**

Witness BDB Contractor performed training of operating staff in optimal operation and maintenance of the delivered facility.

Review BDB Contractor training videos and recommend approval or rejection by the GSA.

Incorporate the GSA approved training videos into the systems manual.

## **5.4 Closeout Stage**

### **5.4.1 Project Awards/Certifications**

Assist the DB Contractor in addressing the commissioning process in the LEED® certification documentation, where applicable.

### **5.4.2 Final Record Documents**

Review and comment on the CxA final record documents based on DB Contractor final as-built drawings and specifications, reflecting all contract modifications and noted field conditions.

### **5.4.3 Closeout Stage Commissioning Activities**

#### **5.4.3.1 Re-Commissioning Manual**

Prepare and submit a re-commissioning manual, providing guidance and establishing timelines for re-commissioning of critical building systems and components.

#### **5.4.3.2 Preliminary Commissioning Record**

Prepare and submit a preliminary commissioning record with all required sections completed except the deferred testing documentation and post-construction review/reinspection reports.

#### **5.4.3.3 Preliminary Systems Manual**

Prepare and submit a preliminary systems manual with all required sections completed except the CMMS administration and user's guides.

### **5.4.4 DB Contract Closeout**

No CxA services required.

## **5.5 Tenant Occupancy Stage**

### **5.5.1 Occupancy Agreements and Rent Phase**

#### **5.5.1.1 CAD Assignment Drawings**

No CxA services required.

### **5.5.2 Operations/Service Phase**

#### **5.5.2.1 Computerized Maintenance Management System (CMMS) Setup**

Assist the GSA in initiating the CMMS system. Incorporate the GSA provided CMMS administration and user guides into the systems manual.

#### **5.5.2.2 Operations/Service Phase Utility Agreements**

No CxA services required.

#### **5.5.2.3 Operations/Service Phase Commissioning**

##### **5.5.2.3.1 Opposite Season/Deferred Testing**

Perform opposite season or deferred testing and deficiency corrections and provide the final testing documentation for the final commissioning record.

#### **5.5.2.3.2 Operational Review/Reinspection**

Ten months after substantial completion, perform the following services:

- Review the operating conditions of all major equipment, identifying those changes necessary to operate the building as designed.
- Review with facility staff, the current building operation and the condition of outstanding issues related to the original and seasonal commissioning.
- Interview O&M staff to identify/document problems in operating the building as intended.
- Make suggestions and recommendations for improvements to O&M manuals.
- Identify problem areas under contractor's or manufacturer's warranties.
- Assist facility staff in developing reports and documents to support requests for warranty services to remedy outstanding problems.

Review and resolve any outstanding commissioning issues recorded in the commissioning issues log.

Prepare a post-construction review/reinspection report documenting the Operations/Service Phase commissioning activities.

#### **5.5.2.3.3 Final Systems Manual**

Prepare and submit the final systems manual with updates and revisions based on the results of the Post-Construction Phase commissioning activities, and incorporating the CMMS administration and user's guides.

#### **5.5.2.3.4 Final Commissioning Record**

After project close-out and performance of warranty period seasonal adjustments to commissioned systems and equipment, make any needed adjustments to the OPR for additional detail and clarity and prepare and submit the final commissioning record, including the final OPR and the post-construction review/re-inspection report.

#### **5.5.2.3.5 1-Year Property Management Retraining**

No CxA services required.

#### **5.5.2.4 Post Occupancy Activities**

No CxA services required.

## **6 ADMINISTRATION**

### **6.1 Payment for Construction Stage Services**

Refer to the FAR Payments clause(s) included in this contract.

### **6.2 Travel**

Unless otherwise indicated in the Scope of Services sections, the CMA is responsible for travel costs to support the requirements contained in this Statement of Work, including all progress meetings, workshops, reviews, and site visits. The CMA shall assume all travel will be within the vicinity of the project site except as specifically indicated otherwise in the Scope of Services sections.

### **6.3 Reproduction and Delivery**

Printing, reproduction and delivery costs necessary for execution of this contract are included the contract fee.

### **6.4 Additional Services**

The GSA may require additional services that are related to but not included in the scope of services provided in this Statement of Work. Such services may be procured by modification of this contract as provided under FAR 52.243-1, Changes – Fixed-Price. Personnel required to perform additional services shall have qualifications as recommended and approved by the GSA appropriate to the nature of the service being provided.

#### **6.4.1 Subcontracting**

If additional services are to be obtained by subcontract, small business subcontracting must be used to the extent agreed upon in the approved CMA subcontracting plan and as otherwise practicable. The CMA may be required, at the direction of the GSA, to obtain competitive bids or offers for subcontracts. The CMA must prepare all solicitation documents, statements of work with performance requirements, cost estimates, price negotiation memoranda, and other documents as required by the GSA. Based on the bids or offers received, fair and reasonable fixed prices will be negotiated with the CMA for having the requirements subcontracted including associated CMA overhead, profit, and commission.

#### **6.4.2 Subcontractors and Consultants**

Any subcontractor or consultant required by the CMA shall be approved in writing by the GSA prior to beginning work. Subcontractors and consultants submitted for evaluation during the procurement process will be considered approved without additional GSA approval. Any substitution of approved subcontractors and consultants, and their personnel, shall likewise be subject to prior written approval by the GSA.

#### **6.4.3 Additional Services Involving Construction**

If the performance of construction work priced in aggregate above specified limits is included in additional services procured by modification of this contract, the contract clauses required in accordance with the following FAR sections shall apply:

FAR 25.1102, Acquisition of construction (Buy American Act provisions)

FAR 22.407, Solicitation provision and contract clauses (Davis-Bacon Act and Copeland Act provisions)

FAR 28.102, Performance and payment bonds and alternative payment protections for construction contracts (payment protections)

#### **6.4.4 Additional Services Contemplated in Contract Pricing**

To the extent applicable, the hourly rates provided in the Contract Price Schedule shall apply to additional services performed by the CMA under modifications to this contract.