

# **Exhibit A**

**Exhibit A**  
**City of Montrose**  
**Owner's Representative Scope Matrix**

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:
<b>Pre-Design</b>				
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 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 Owner. Provide detailed analysis and advice to the Owner in the evaluation of proposals.	x			
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 the Owner with the development and review of contracts with consultants and assist in the negotiation of fees and contracts with consultants. The Owner's attorney will review contracts; however, consultant will assist with understanding the sublease language signed by the Owner for financing and the coordination of all contracts and signed agreements.	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.	x			
Coordinate with the design team throughout the design phases and create progress reports to be delivered to the Owner as design proceeds.	x			
Assist with the development of a Master Budget, 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 Owner in all budget matters.	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 Owner.	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, 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**

<p>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.</p>	<p align="center">x</p>			
<p>Initiate a project review process to review, at a minimum, design options for interior and exterior, high performance design, customer and staff safety, code compliance, with appropriate Owner committees/ personnel/ stake holders etc....</p>	<p align="center">x</p>			
<p>Assist with the outline of a capital reserve budget program that addresses the life cycle of equipment and systems of the project.</p>	<p align="center">x</p>			
<p>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.</p>	<p align="center">x</p>			
<p>Maintain design team accountability to the design intent as described in the project scope.</p>	<p align="center">x</p>			
<p>Provide weekly status reports to the Owner summarizing progress, schedule and cost status, major decisions, changes and other key project information.</p>	<p align="center">x</p>			
<p>Oversee the establishment of a schematic design estimate and take necessary action such that project is within budget prior to proceeding to Design Development.</p>	<p align="center">x</p>			
<p>Assist the Owner in their review and approval of schematic design.</p>	<p align="center">x</p>			

Assist with Design Development				
Assist the Owner in developing FF&E requirements including inventory of all existing FF&E. 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			
Initiate project review of drawings/specs and cost estimate with Owner for review prior to proceeding to Construction Documents.	x			
Provide weekly status reports to the Owner summarizing progress, schedule and cost status, major decisions, changes and other key project information.	x			
Assist with Construction Documents				
Provide monthly status reports to the Owner summarizing progress, schedule and cost status, major decisions, changes and other key project information	x			
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 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	x			
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			

Be knowledgeable of 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 Owner's Representative, forward certificates to the Owner. As the general contractor's insurance is renewed, the Owner's Representative is to provide updates to the Owner until the general contractor no longer holds the project insurance.	x			
<b>Oversee Construction Process</b>				
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			
Assist with placement of construction trailers, fences, signage, staging areas, and construction traffic zones.	x			
Coordinate moving and storage of equipment and furnishings as necessary.	x			
Monitor safety compliance with all Federal/State/Local requirements (not limited to OSHA, EPA, and EEO) thru the General Contractor.	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 Owner 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. Owner's Representative to coordinate with all	x			

consultants/ vendors responsible for the non-conforming work to implement a corrective solution.				
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 Owner of such.	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 Owner. The Owner's Representative will be responsible for accuracy of the request and will coordinate with Owner any comments or questions.	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			
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, during construction.	x			
Provide weekly status reports to the Owner summarizing progress, schedule and cost status, major decisions, changes and other key project information.	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 transfer of stock supplies of materials to the Owner as indicated in the specs or construction agreement.	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.	x			
Assist the Owner in the collection of all closeout 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			
Assist the Owner in acceptance and issuance of the final pay application and verify that the advertising for final payment has been completed.	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.	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 summarizing progress, schedule and cost status, major decisions, changes and other key project information affected through the warranty period.				
<b>Coordinate Community Involvement</b>				
Promote that staff and community are engaged in the progress of the project, identify key milestones in the design and construction process, and cooperate and facilitate with the Owner's team, the creation of presentations for City Council and community members.	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			
<b>Assist with Post Occupancy</b>				
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	x			

warranties and to assist the Owner with operations as needed during the first 24 months.				
Be available to assist with development/demonstration projects related to the building.	x			
<b>Limitations of Authority</b>				
<b>The Owner's Representative shall NOT:</b>	x			
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			
Expedite the work for the Contractor.	x			
Assume any of the responsibilities of the Contractors or of Sub-contractors.	x			
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			
Enter into any agreements or commitments on the owners' behalf.	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			

