

ITEMIZATION OF ALL WORK SERVICES OR WORK TASKS

1. Site Analysis: Site Evaluation:

- Provide final plat of site.
- Provide topographic and boundary survey. Check major features through on-site observations.
- Determine zoning requirements.
- Secure photographs showing major site features and surrounding influences.
- Determine drainage, erosion control and storm water detention requirements.
- Assist the City of Ankeny in securing necessary soil and related site tests and required investigations.
- Determine availability, quantity, and quality of existing site utilities.
- Have the design team and all consulting staff visit and examine the site. Confirm that all site data has been reviewed by all responsible parties prior to proceeding with site design.

2. Schematic Design:

- Distribute project schedule to the City of Ankeny, project staff, and consultants.
- Review all data furnished, including building design program, budget, project budget, legal, site, code, space, and special owner requirements.
- Prepare functional space plans.
- Provide engineers and consultants with pertinent program data and functional space plans.
- Analyze comparative systems with engineers and consultants; select systems to be used in the project. Determine system space and location requirements.
 - Structural
 - Mechanical
 - Electrical
 - Other consultants
- Review architectural schematic diagrams with consultants. Conduct one or more consultant coordination meetings regarding system compatibility.
- Prepare and present basic Schematic Design documents to include:
 - Site plan with diagrammatic indications showing horizontal relationships.
 - Principal floor plans.
 - General descriptive views or elevations.
 - Illustrative sketches, models, or renderings, if necessary (renderings and models would not be part of Basic Services).
- Calculate areas and volumes, and analyze plan efficiency of the design by usable area, area per person or other method.
- Prepare a general description of the project, including materials and equipment outlines.
- Start project outline specifications.

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2. Schematic Design continued:

- Obtain and review statements of probable construction cost from each consultant.
- Have cost consultant prepare an estimate of probable construction cost based on all available data. Include appropriate design contingency.
- Submit Schematic Design documents to the City of Ankeny. (These documents may include, but may not be limited to, drawings, descriptions, calculations, outline specifications, colors, materials, and statements of probable construction cost).
- Document revisions to scope of the work and review with the City of Ankeny.
- Obtain the City of Ankeny's written approval of Schematic Design documents.
- Obtain the City of Ankeny's written authority to proceed to the Design Development phase.

3. Design Development:

- Review unresolved issues on Schematic Design checklist.
- As documents develop, confer with and obtain preliminary review from regulatory agencies such as:
 - Building department
 - Fire marshal (state and/or local)
 - Plan and Zoning commission
 - Other
- Receive results of all investigations and tests, including soil borings and analysis. If necessary, request additional information. Forward final information to appropriate consultants.
- Review all other data received from the City of Ankeny and consultants. If necessary, request additional data.
- Obtain the City of Ankeny's standards and requirements, if any, for document format and other presentation materials.
- Define actual occupancy for each area, check against program, and forward to consultants.
- Request that the structural engineer(s) investigate and report on their review of applicable regulations.
- Request that the mechanical and electrical engineers:
 - Notify the Architect of space and location requirements for systems

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3. Design Development continued:

- Prepare site plan indicating building location(s) and site improvements.
- Prepare other necessary documents to include: plans, elevations, sections, schedules, and notes.
- Prepare area calculations (net and gross).
- Prepare a preliminary Project Manual.
- Update materials, equipment, fixtures, and building systems file.
- Direct consultants to prepare design documents as required to illustrate and describe their portions of the project.
- Conduct one or more group coordination meetings with consultants.
- Reach agreement on structural, mechanical, electrical, and other building systems.
- Confirm that the selected engineering and construction systems are compatible.
- Direct consultants to provide preliminary construction cost estimates for their portions of the project.
- Update the statement of probable construction cost. If specifically requested by the City of Ankeny, provide a detailed cost estimate as an additional service.
- Submit Design Development documents.
- Plan and prepare appropriate presentation materials.
- After the presentation, identify changes, repercussions, contradictions or conflicts and discuss with the City of Ankeny.
- Confirm with the City of Ankeny which contracting procedure will be used.
- Obtain the City of Ankeny's written approval of Design Development documents.
- Obtain the City of Ankeny's written authorization to proceed to Construction Documents phase.

4. Construction Documents:

- Review unresolved issues on the Design Development checklist.
- Review and update schedule of completion dates for this and all subsequent phases. Inform the project team and the City of Ankeny of any revisions.
- Establish a clear chain of command and response for the Construction Documents phase.
- As documents develop, confer with and obtain further review from regulatory agencies such as:
 - Building department.
 - Fire marshal (state and local).
 - Other
- Check with the applicable regulatory agencies and establish schedule for submission and/or review.

ITEMIZATION OF ALL WORK SERVICES OR WORK TASKS**4. Construction Documents continued:**

- Coordinate the work of all team members, including consultants.
- Coordinate drawings with Project Manual.
- Update preliminary construction cost estimate and advise the City of Ankeny of any changes.
- Review the program and verify compliance.
- Re-check Design Development documents for code compliance.
- If applicable, determine alternates, cash allowances and unit prices.
- Obtain the City of Ankeny's instructions on insurance, bonds, construction agreements and bidding procedures.
- Submit copies of General and Supplementary Conditions for the City of Ankeny's review, or obtain the City of Ankeny's specific contract requirements.
- Determine what items, if any, are to be furnished by the City of Ankeny, and those items not to be included in the contract.
- Verify the City of Ankeny's acceptance of the proposed designs for mechanical and electrical systems.
- Obtain schedule for delivery and installation of City of Ankeny's furnished material.
- Assemble final drawings and specifications for coordination.
- Conduct team meetings to resolve coordination issues.
- Revise documents as required.
- Assemble bidding documents.
- Determine whether prevailing wage rate statutes apply in project jurisdiction.
- Prepare final calculations of net and gross areas and volumes.
- Obtain each consultant's final construction cost estimate for their portion of the project.
- Prepare final construction cost estimate.
- Submit drawings, Project Manual, construction cost estimate, and area calculations to the City of Ankeny.
- Review list of potential bidders with the City of Ankeny.
- Obtain and review qualification statements from interested bidders.
- Place Architect's and engineers' seals on the documents and obtain signatures required by reviewing authorities.
- Assist the City of Ankeny in filing documents for final approvals and permits.
- Obtain the City of Ankeny's written authorization to proceed to the Bidding or negotiation phase.

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5. Bidding or Negotiation:

- Review unresolved issues from Construction Documents phase.
- Review and update project schedule.
- Investigate whether other major projects have concurrent bid dates, or if other factors require bid date modification.
- Identify the Architect’s and City of Ankeny’s respective responsibilities in advertising for bids, receiving bids, bid evaluation, and negotiation.
- For open bidding, publish advertisement for bids (in some cases, the City of Ankeny may publish). If separate prime contracts are to be awarded, separate advertisements may be necessary.
- Obtain and review qualification statements from interested bidders.
- Prepare register of bid documents.
- Distribute bidding documents to bidders and obtain deposits.
- Issue documents to plan rooms.
- Hold a pre-bid conference, prepare a report, and distribute copies.
- Record responses to bidders’ requests for clarification in the form of a written addendum distributed to all bidders.
- Upon return of documents, refund bid security to bidders who either withdraw or are disqualified.
- Evaluate proposed substitutions and request for product approval; notify bidders of accepted substitutions by addendum.
- Prepare a bid tabulation form.
- Assist the City of Ankeny in the receipt, tabulation and analysis of bids; check bids for irregularities.
- Advise the City of Ankeny on selection of alternates and obtain the City of Ankeny’s approval.
- Assist the City of Ankeny in the process of acceptance or rejection of bids.
- Notify bidders of acceptance or rejection; obtain return of bidding documents from unsuccessful bidders. Return their deposits and bid securities. (Hold bid security of lowest bidders until execution of the contract.)
- Request and receive submission of post-bid information.
- Assist City of Ankeny’s legal counsel in preparation of construction contract(s). If separate prime contracts are to be awarded, obtain assistance of consultants.
- Schedule times for confirmation of required City of Ankeny and Contractor insurance coverages.

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5. Bidding or Negotiation continued:

- Obtain from the Contractor performance bonds, labor and material payment bonds, and any contract bonds required by statute. Review and forward copies of bonds to the City of Ankeny.
- Obtain the Contractor’s certificate of insurance. Review and forward copies of the certificate to the City of Ankeny.
- Obtain a copy of the property insurance policy from the party responsible for obtaining such coverage. Review and forward copies to the other party.
- Identify and review any atypical insurance arrangements between City of Ankeny and Contractor. Include descriptions of such arrangements in the contract.
- Assist the City of Ankeny in preparing and sending to the Contractor(s) notices to proceed with the work.
- Provide the Contractor with all necessary contract documents.
- Obtain City of Ankeny’s written approval to proceed with Construction Contract Administration phase.

6. Construction Contract Administration:

- Review unresolved issues from Bidding phase.
- Review and update project schedule.
- Create construction contract administration files to include:
 - Correspondence and meeting reports
 - Schedules
 - Field reports
 - Phone log
 - Requests for Information (RFIs)
 - Requests for Proposals (RFPs)
 - Construction Change Directives (CCDs)
 - Change Orders
 - Supplemental instructions
 - Quality control reports
 - Submittals
 - Agency inspections, permits and approvals
 - Applications for payment
 - City of Ankeny-Contractor agreement(s)
 - Schedule of Values
 - Observations of contractor performance
 - Certificates of insurance

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6. Construction Contract Administration continued:

- Property insurance policy
- Contract bonds
- Project close-out
- Assign contract administration and site observation responsibilities.
- With the City of Ankeny, review and approve or take other appropriate action on Contractor's list of subcontractors and suppliers.
- Notify the consultants of selected prime contractor(s) and subcontractors.
- Obtain and review Contractor's submittal schedule.
- Establish a time for the preconstruction meeting.
- Establish site observation and project meeting schedules; coordinate with agency inspection requirements.
- If required, notify the Owner to submit applications for permanent gas, electric, water, telephone and other services.
- Have City of Ankeny file a copy of all property insurance policies with Contractor.
- Review construction budget (including contingencies) with the City of Ankeny.
- Review City of Ankeny's supplied labor and materials.
- If required, send the notice to proceed to the Contractor.
- Keep the City of Ankeny informed on the progress of the work. Prepare a field report for each visit to the site.
- Obtain and review the Contractor's updated progress schedule and advise the City of Ankeny of potential revisions to anticipated occupancy date.
- Prior to the first application for payment, receive, review and approve, if appropriate, Contractor's schedule of values.
- Receive and review the Contractor's applications for payment; respond appropriately.
- Verify requirements, if any, for reduction in retainage and have Contractor submit consent of surety documentation.
- List tests required for the project and note their approximate dates in accordance with current construction schedule.
- Obtain and review required test reports.
- Receive submittals; review, take appropriate action, and return to the Contractor.
- Maintain submittal log.
- Review Contractor's proposed cost for changes and respond appropriately.
- Receive from the Contractor notification of substantial completion and list of items to be completed or corrected.
- Inspect the project to confirm substantial completion.
- Respond to the Contractor's punch list of remaining work to be repaired or completed.
- If applicable, review Contractor's request for a reduction of retainage.

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6. Construction Contract Administration continued:

- When the project is judged to substantially complete, prepare a Certificate of Substantial Completion.
- If reproducible record drawings are required, provide the Contractor with appropriate media.
- Request that the Contractor submit project close-out documents.
- Review the close-out submittals for completeness.
- Verify that the Contractor has obtained a certificate of occupancy or occupancy permit.
- Review the Contractor’s request for final inspection and conduct a field inspection of the project to confirm completion.
- Prepare a final field inspection report.
- Review the Contractor’s application for final payment, including required attachments such as waivers of lien and consent of surety documentation.
- Issue a final certificate for payment.
- Prior to the expiration of the one-year period of corrections, obtain the City of Ankeny’s authorization to conduct an inspection to determine if any work is required by the Contractor to remedy defects.

7. Post Construction:

- Review the building eleven months after Substantial Completion and assist the City of Ankeny with any items that require the Contractor to correct prior to the end of the one year warranty period.

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Scope of Services Summary: A full range of services is required for this project, which shall include the following:

- Development of a site plan
- Preparation of design and construction documents including drawings and specifications
- Attend pre-bid and bid opening conferences
- Communicate with City staff during development and bidding of the project
- Communicate with potential bidders
- Perform project management
- Review contractor's pay applications
- Administer change orders
- Conduct construction observation services
- Communicate with City of Ankeny building officials during construction and provide Certification of Substantial Completion