

## **APPENDIX 1**

### **SCOPE OF DESIGN SERVICES**

#### **(TITLE I / TYPE A & B)**

#### **1. OBJECTIVE:**

- 1.1** To design a complete and usable facility design that satisfies the identified requirements in the Project Book; is completed within the time frame of the agreed upon design schedule; conforms to all applicable and identified design codes, regulations, criteria, and professional design standards; and provides a low maintenance, energy-efficient facility that can be constructed within the maximum construction cost limitation. All possible efforts will be made by the Design Consultant to satisfy the Users' requirements within established criteria.

#### **2. DEFINITIONS:**

##### **2.1 Owner.**

- 2.1.1** The Owner is The Armory Board for the Iowa Army National Guard (IAARNG), a division of the Iowa Department of Public Defense (Military Division)
- 2.1.2** The Federal entity within the Army National Guard (ARNG) which provides oversight to the State for the design and construction of IAARNG facilities is the National Guard Bureau (NGB) – Army Installations Division (ARI).
- 2.1.3** The State entity within the IAARNG responsible for the design, construction, and maintenance of all IAARNG facilities is the Directorate of Installation Management (DIM). The DIM is also referred to as the Construction and Facilities Management Office (CFMO) and is housed in Building B-61, Camp Dodge. The Director of Installation Management (also referred to as the DIM) leads this organization.

**.1** The DIM or CFMO is made up of 6 Branches:

- .a** Contracting and Construction Management (CCM)
- .b** Design and Project Management (DPM)
- .c** Environmental (ENV)
- .d** Facility Management (FM)
- .e** Real Estate, Programming and Planning (REPP)
- .f** Resource Management (RM)

**.2** The Design Consultant will work primarily with the CCM and DPM branches through the personnel identified below.

##### **2.1.4 Owner Personnel:**

**.1** Contracting Officer (CO):

- .a** The Contracting Officer (CCM branch) is the official designated Owner's Representative as defined in the Contract for Design Services. The Contracting Officer is the only person having express authority to execute contracts and changes to contracts on behalf of the Owner and to bind the Owner with respect to all matters requiring the Owner's approval or authorization.

**.2** Project Manager (PM):

- .a The Project Manager (DPM branch) is responsible for the daily actions and communication on behalf of the Owner and the Users throughout the design phase of the project. The Project Manager will be the primary point of contact for the Design Consultant throughout the design phase.

**.3 Construction Manager (CM):**

- .a The Construction manager (CCM branch) is responsible for the daily actions and communication on behalf of the Owner and the Users throughout the construction phase of the project. The Construction Manager will be the primary point of contact for the Design Consultant throughout the construction phase and is addressed further in the "Scope of Design Services – Title II / Type C".

**.4 Users:**

- .a The Users are IAARNG soldiers and/or state personnel who currently occupy and/or will occupy the facility upon completion. The Users will name a designated representative who will be the primary point of contact throughout the design phase of the project. The Project Manager will relay User requirements and all other correspondence between the Design Consultant and Users. The Design Consultant should not directly receive instruction from the Users regarding the design.

**2.1.5** The Iowa Department of Public Defense, IAARNG, DIM, CFMO, and its personnel will hereafter be referred to as "Owner" as if singular in number. Where the Project Book requires the Design Consultant to forward submittals or other information to the Owner, effort will be made to identify the individual to whom the item should be directed. (i.e. "...to the Owner's Contracting Officer", "...to the Owner's Project Manager", etc.).

**2.2 Design Consultant (A/E):**

**2.2.1** The Design Consultant is the person or entity lawfully licensed to practice architecture or engineering in the State of Iowa.

- .1 The Design Consultant shall name a designated representative who will be the primary point of contact throughout the design phase of the project. This representative will hereafter be referred to as the A/E Project Manager. As part of your proposal, identify the Project Manager and provide contact information (phone and email).
- .2 The Design Consultant will be hereafter referred to as the A/E and shall refer to the A/E, the A/E's representative, employees, or consultants as if singular in number.

**3. DESIGN SERVICES:**

**3.1 TITLE 1 / TYPE "A" - Site Investigation Services:**

**3.1.1** Services shall include investigations and documentation of data essential for the Design Services and production of the construction documents; including, but not limited to:

- .1 Topographical surveys
- .2 Site surveys
- .3 Geotechnical surveys
- .4 Surveys of utility locations and capacities
- .5 Existing building construction, layout, and systems surveys (if applicable)
- .6 Review of Owner-provided information

- .7 Similar fact-finding investigations, and technical studies

### **3.2 TITLE I / TYPE "B" - Design Services:**

- 3.2.1** Production of complete designs, drawings and technical specifications, with services including but not limited to:

- .1 Schematic Design
- .2 Design Development and Construction Documentation
- .3 Bidding Assistance
- .4 Code review
- .5 Review and incorporation of Owner criteria, standards, and other items
- .6 Cost Estimating
- .7 Development of supporting design data

- 3.2.2** Design Document Submittals shall be made at the completion of each of 5 (five) Design Phases:

- .1 Schematic (10%).
- .2 Conceptual (30%)
- .3 Preliminary (60%).
- .4 Final (90%)
- .5 Bid Final (100%)

- 3.2.3** A description of the Design Document Submittals required at the completion of each Design Phase and number of copies to be submitted is as identified in the Project Book.

- 3.2.4** Bidding Assistance Services shall include:

- .1 Preparation of addenda to the bidding documents
- .2 Response to bidder's questions during the Bidding Phase
- .3 Attendance at the Pre-Bid Conference
- .4 Evaluation of the bids

- 3.2.5** Commissioning services will commence with start of design process and follow on through the contract administration (separate contract issued after award of the construction contract). The consultant firm will identify a commissioning agent who will provide commissioning services as defined in USGBC LEED version 4 Enhanced Commissioning Credit, excepting building envelope commissioning.

### **3.3 Design Services Requirements:**

- 3.3.1** Maximum Construction Cost (MCC):

- .1 The MCC is the Owner derived dollar amount expected for the low bid. Construction contingencies are not included in the MCC and should not be included in the A/E's opinion of probable costs. If it becomes evident to the A/E at any point during the Design Services that the construction costs will exceed the MCC, the A/E shall immediately notify the Owner's Project Manager and all work shall cease and be held in abeyance until funding differences, scopes, and/or criteria are resolved and such changes as may be required are executed. The A/E shall assist the Owner to identify those areas where cost reductions can be made without adversely affecting the design objective. The Project Manager will coordinate this information with the Contracting Officer. The MCC for this project is \$7,688,000 which includes \$268,260 for a geothermal ground source heat pump system.

- 3.3.2** Base Bid and Alternate Bid Items (ABI's):

- .1 A project's base bid must provide a complete and usable facility that meets the minimum requirements identified in the project book.
- .2 Alternative Bid Items are required to insure award and execution of the project within the MCC and as such are separate line items of work that incorporate additional features not absolutely necessary to provide a complete and usable facility. Proposed Alternate Bid Items shall be reviewed with the Owner at each Design Phase as the A/E's opinion of probable cost is refined.

### **3.3.3 Code Review:**

- .1 Code review shall meet all State Fire Marshal (SFM) requirements and shall include a preliminary review and final submittal to the SFM with revisions to the construction documents as required until all SFM review comments have been satisfied.
- .2 Design Schedule shall allow (40 days minimum) for SFM review and adequate time for subsequent construction documents revisions. Bid Final document submission should include all such revisions.
  - .a If the Owner mandated Bidding Date does not allow adequate time in the Design Schedule to accomplish the above, revisions to the construction documents in response to SFM review comments may be addressed by addendum during the bidding phase.
- .3 Design Service (Title I / Type B) shall include:
  - .a All State Fire Marshal review and inspection fees
  - .b Local municipality fees (if applicable)
  - .c Energy Code Review
  - .d Life Cycle Cost Analysis (if applicable).

### **3.3.4 LEED:**

- .1 Design Service (Title I / Type B) shall include:
  - .a All USGBC fees associated with application, review, and resubmittal for LEED projects. The bulk, if not all, of these costs should be on the construction contractor. Only fees required to register the project during the design phase are to be borne by the design consultant.
  - .b Use USGBC Version 4 standards. Do not include building envelope commissioning.

### **3.3.5 Design Schedule:**

- .1 The A/E shall promptly, after the execution of the Contract for Design Services, complete and submit to the Owner's Project Manager for review and approval the updated Design Schedule. The schedule shall provide for completion of all work identified in the Contract within the Contract time. The Design Schedule shall be updated and submitted at the completion of each Design Phase.

### **3.3.6 Owner Review:**

- .1 The A/E shall allow 7 days minimum (14 days preferred) in the Design Schedule after each Design Phase Document Submittal for Owner Review.
- .2 The A/E shall allow 15 days minimum in the Design Schedule after each Design Phase Document Submittal for NGB Review (required for this project as it is Military Construction). The Owner's Project Manager will be responsible for forwarding Design Document submittals to NGB and relaying NGB comments back to the A/E.

### **3.3.7 Design Review Meetings:**

- .1** Design Review Meetings will be held at the project site at the 10%, 30%, 60% and 90% Design Phases following Owner review of the respective Design Document Submittals.
  - .a** Representatives from each design discipline are required to attend progress review meetings.
  - .b** Meetings will be Owner-led.
  - .c** Owner will forward review comments to the A/E Project Manager prior to the meeting for review.
  - .d** Meeting Minutes shall be taken by the A/E Project Manager and forwarded to the Owner's Project Manager electronically.
  - .e** A/E shall submit the review comments document back to the Owner with the subsequent Design Document Submittal. All review comments shall have been addressed with playback by the A/E entered after each line item.

### **3.3.8 Design Services Management and Execution:**

- .1** Design Services shall:
  - .a** Include as many site visits as are required by the A/E to effectively complete the Design Services.
  - .b** Recognize input from the Construction and Facilities Management Office and other Owner entities including but not limited to Anti-Terrorism/Force Protection, Telecommunication, Physical Security, Electronic Security, Energy, Waste Reduction and Safety.
  - .c** Incorporate into the design all applicable criteria, regulations, and standards provided in this Project Book or otherwise by Owner.
- .2** The Owner's Project Manager or any other Owner representative, apart from the Contracting Officer, does not have the authority to direct changes in the contract; however, the Project Manager may direct changes to the design and/or the design process.
- .3** If the A/E feels that any information or direction given by the Owner's Project Manager or any other Owner representative, apart from the Contracting Officer, is in conflict with criteria, direction, or funds provided in the contract or which may be construed as a change in contract requirements, the A/E is to notify the Contracting Officer prior to any action for clarification.
- .4** The A/E shall furnish sufficient technical, supervisory, and administrative personnel to ensure the progress and completion of the work in accordance with the approved Design Schedule.
- .5** A/E Project Manager shall be responsible for disseminating all relevant Owner correspondence, meeting notes, review comments, instructions, etc. to their employees and consultant's.
- .6** Drawings shall conform to the IAARNG CADD Standards.
- .7** Specifications format shall conform to CSI Master Format 2004. Footers shall match template provided by the Owner.

### **3.3.9 Errors and Omissions:**

- .1** The A/E is responsible for the technical competency, accuracy, and completeness of the construction documents. The Owner reserves the right to hold the A/E liable for any additional construction costs resulting from A/E

errors and omissions. In such case, the A/E shall be liable for only the difference between actual construction cost and what it would have cost had the A/E not made the errors and omissions.

**3.3.10 Post Bidding Design Revisions:**

- .1 In the event that no acceptable bona fide bid is received within the Maximum Construction Cost (MCC), the A/E shall, at the direction of the Contracting Officer, and at no further cost to the National Guard Bureau or the Armory Board, revise the construction documents for re-bid until an acceptable bona fide bid is received within the MCC. Revisions shall be coordinated with and approved by the Owner. Reproduction and distribution of revised construction documents for bidding will be provided by the Owner.

**3.4 Information/Services provided by the Owner:**

**3.4.1** The following items will be furnished to the Consultant upon Award of Contract:

- .1 Project Book.
- .2 Project scope and programming documents.
- .3 Existing site and building plans, including all available drawings and electronic files applicable to the project.
- .4 Copies of Army National Guard Design Guides and other Owner criteria, standards, regulations and design requirements applicable to the project.
- .5 Location of site utilities as best is known by the Owner.
- .6 "Boiler-Plate" front-end specification documents (Division 0).
- .7 Advertisement for bidders and reproduction and distribution of contract documents for bidding purposes.
- .8 Opening of Bids and award of Construction Contract.

**3.5 Fees:**

- 3.5.1** Design service fees shall be lump-sum and will be limited to a not-to-exceed amount of 3% for Type A services and 6.4% (includes .4% for commissioning) for Type B services. The successful offeror will also be contracted to provide construction administration services for the construction phase (up to 5.1% which includes .6% for commissioning). NOTE – This will be a separate contract awarded after construction contract award. It is NOT part of this proposal.