

**PROGRAM MANAGEMENT SERVICES**  
**Scope of Work**

**City of Manchester, NH**  
**School Facility Improvement Project**  
**Design/Build/Finance Program Management Services**

The City of Manchester (the "City") is currently requesting Qualifications and Expressions of Interest from Program Management firms for construction oversight of the additions and renovations of various schools in the Manchester school district.

Once qualification packages have been received and reviewed, a "shortlist" of applicants will be invited to respond to a "Request For Proposals" (RFP). The "shortlisted" candidates will be forwarded specific information relative to the Project (RFP, scope of work, anticipated phasing schedule etc.) for use in preparation of the proposals. The successful candidate will be chosen based on the proposals received. The services requested are listed in the scope of work section below. This is in "draft" form and will be used as the basis of the RFP.

The Program Management team will monitor the School Facility Improvement Program "Design Build Finance" (DBF) project from the commencement of the contract award (tentatively April 2003) through the issuance of final payment. The School Facility Improvement Program will consist of renovations to twenty-one schools and additions to five schools. Construction is expected to commence on or about April 2003 and will continue for four to six calendar years. School construction experience and prior school / municipal construction oversight is mandatory.

It is anticipated that construction will take place at multiple sites at concurrent times. Multiple construction and design teams will be assembled in order to execute the project. The Program Manager will be required to staff the project accordingly.

A comprehensive RFP (design/construction services) for the project is available on the City web site, at <http://www.ci.manchester.nh.us>, (click "Doing Business", then "Procurement and Bids" then "Department of Public Works").

The City reserves the right to alter the process, within the context of its' Procurement Code, at any time.

Sincerely,

Timothy J. Clougherty  
City of Manchester  
Facilities Engineer  
Dept. of Public Works  
Manchester, NH 03103

## **SCOPE OF SERVICES**

### **General**

The extent of the Program Management (PM) services currently being sought is best described as an extension of the Department of Public Works (DPW). The PM will assume all responsibilities normally conducted by the DPW during prosecution of a conventional construction project. The PM will report directly to the Owners' Representative.

The scope of services is generally described below, although this is not intended to be all-inclusive. The PM will be required to staff the project with the number and quality of personnel in order to facilitate all aspects of construction administration from an Owners' perspective.

The PM will be required to employ a full-time, on-site staff, dedicated to the project. This staff is to include, at a minimum: A project manager/executive, construction monitoring personnel, and administrative support. Additional support staff (engineers, architects, etc.) will be an integral part of the management program, although not necessarily on a full time basis.

The Program Manager will be required to staff and maintain a local "Field Office". Minimal provisions for this office will be arranged by the City, through the DB Contractor. Further information will be contained in the Request For Proposals for Program Management Services.

The Contract for Program Management Services will reference this document. Additionally, the contract will be based on the RFP issued by the City of Manchester, NH, dated 9/23/02 and supplemental conditions to such. The scope of Program Management services will cover the final accepted proposal from the successful Design-Build-Finance candidate. The schedule for construction will be referenced as part of the PM agreement as well.

### **Organization, Management & Project Reporting**

- **COORDINATE INFORMATION FLOW**  
The PM shall coordinate and expedite the flow of information among the Owner, DB Contractor, and others, and track decisions required by each party.
- **PREPARE MONTHLY REPORTS**  
The PM shall prepare weekly and monthly reports to update the Owner on the status and progress of the various projects.
- **CONDUCT INTERNAL PROJECT MEETINGS**  
The PM shall conduct project meetings (and distribute minutes of same) for internal staff orientation and organization, and attend other meetings as required by the Owner.
- **CONDUCT EXECUTIVE BRIEFINGS**  
The PM shall conduct periodic Executive Briefings to the Owner's Management.
- **SETUP AND MAINTAIN THE "MANAGEMENT INFORMATION SYSTEM (MIS)"**

PM shall setup a Management Information System to track and report contract information including original contract amount, change proposals, change orders, claims, shop drawings, submittals, correspondence, invoices, labor reporting, daily reports, etc. An electronic postal system shall be set up and maintained by the PM with links to the owners' representative and other parties as directed by the Owner. The MIS shall be accessible through the Owner's office (minimum 2 locations) as well as the Field Office.

- **PREPARE PROJECT MANUAL**

The PM shall prepare a Project Manual which outlines the responsibilities of each party and describes the guidelines/procedures, including communications, correspondence and files, required for working on the Project.

- **PUBLIC HEARINGS**

The PM shall assist the Owner and DB Contractor with formal presentations. The PM shall attend all public hearings and any others the owner may deem necessary.

- **ASSIST WITH INTERNAL PUBLICITY**

The PM shall prepare an internal newsletter to familiarize internal staff, Boards, Committees, Faculty, and Citizens with the Projects' progress.

### **Accounting**

- **ESTABLISH THE PROJECT ACCOUNTING CODING SYSTEM**

The PM shall work with the Owner to establish a project account coding format to track the project budget, contracts and coordinate with the Owner's reporting requirements.

The PM shall monitor and track contract all cost information associated with the project including but not limited to: original budget, original contract amount, change proposals, change orders, claims and pay requests.

### **Decisions and Approvals**

- **FACILITATE OWNER APPROVAL PROCESS**

The PM shall work with the Owner to document the process required to receive each of the key approvals and list their staff or committees responsible for project approvals. Issues of probable focus at each approval step are to be identified.

- **FACILITATE AN AGENCY APPROVAL CHECKLIST**

The PM shall prepare a checklist of agencies and organizations that must approve the Project or parts thereof.

- **MEET WITH KEY APPROVAL ORGANIZATIONS**

The PM shall meet with the key approval organizations to acquaint them with the Project and document their concerns, approval process and schedules.

- **PREPARE A SCHEDULE OF APPROVALS**

The PM shall prepare a schedule of all mandatory approvals by the Owner and external agencies.

- **RECEIVE CONTINGENT APPROVALS**  
The PM shall solicit and document contingent approvals where required

## **Design and Programming Phase**

- **CONDUCT DESIGNER ORIENTATION CONFERENCE**  
The PM shall conduct a designer Orientation conference attended by the DB Contractor, the Owner and others. During this conference, the PM shall review the Project Goals and Objectives, Management Plan, the Master Schedule, design Submittal and Milestone Schedule, approval process, the Project and Construction Budget, lines of communication, Decision Tracking and Project Reporting.
- **CONDUCT WORK SESSIONS TO FOCUS ON CRITICAL ISSUES**  
The PM shall conduct periodic work sessions to resolve critical issues regarding the building's use and occupant requirements. Work sessions will include DPW staff, school district staff and faculty, the DB Contractor and his team of designers, at a minimum.
- **CONDUCT DESIGN REVIEW**  
The PM shall review design drawings and specifications during their development. Review shall focus on compliance with contract requirements, constructability, maintainability and economics of operation. Provide recommendations on relative feasibility of construction methods, availability of materials and labor, time requirements for procurement, installation and construction, and factors related to cost including costs of alternative designs or materials, preliminary budgets, maintainability and possible economics. The PM shall review the design documents for compliance with environmental regulations. The PM shall coordinate with the Owner for the review of environmental impacts associated with the development plan. The Program Manager will be responsible for approval of all submittals.
- **RECOMMEND ALTERNATIVE BUILDING SYSTEMS AND MATERIALS**  
The PM shall work with the Owner and the DB Contractor to recommend specific selections or ranges of alternative building systems and materials, which are appropriate for the project. This shall include architectural, structural, mechanical and electrical systems as well as all other aspects of building construction.
- **BALANCE COST AND SCOPE ISSUES**  
The PM shall work with the Owner to balance the project scope and budget to meet their project goals.
- **REVIEW, APPROVE, PROCESS, AND MANAGE SUBMITTALS**  
In collaboration with the DB Contractor and Owners' representative, establish and implement procedures for expediting the processing and approval of construction plans, product data, samples, and other submittals. Submittals are to be reviewed for

conformance with requirements prescribed in the Contract Documents. A further description of these requirements is found in specification section 01330. A submittal log shall be maintained and kept current by the PM at all times. An electronic version of the submittal log shall be available to the Owner at all times.

- **PERMITS**

Assist DB Contractor in obtaining permits for construction and occupancy excluding permits required to be obtained directly by the various Contractors. Verify that the Owner has paid applicable fees and assessments. Assist in obtaining approvals from authorities having jurisdiction over the Project.

## **Construction Phase**

### **Administrative**

- **ESTABLISH JOB-SITE ORGANIZATION**

- **PREPARE ORGANIZATIONAL CHART AND RESPONSIBILITY MATRIX**

- **ATTEND PRECONSTRUCTION CONFERENCES FOR ALL CONTRACTORS AND VENDORS**

- **CONDUCT CONSTRUCTION PROGRESS MEETINGS**

The PM shall conduct Project meetings, as required, attended by the Owners representative, the DB Contractor, team members, and subcontractors. Such meetings shall serve as a forum for the exchange of information concerning the Project and the review of construction progress. The PM shall promptly prepare and distribute minutes of these meetings to the Owner, DB Contractor and any other pertinent or interested party.

- **SELECTION OF FURNITURE AND EQUIPMENT**

The PM shall prepare the Request for Proposal, proposal review, interviewing, bid preparation and where appropriate, contract negotiations for Furniture and Equipment.

- **COORDINATE OWNER CONTRACTED CONSULTANTS**

The PM shall coordinate the work of all consultants contracted directly with the Owner.

- **UPDATE THE PROJECT MANUAL**

The PM shall make recommendations to the Owner regarding revisions to the Project Management Plan and Responsibility Matrix. Revisions approved by the Owner shall be incorporated into the Project Manual.

- **PROVIDE RECOMMENDATIONS FOR ASSIGNMENT OF RESPONSIBILITY**

The PM shall provide recommendations and information to the Owner and the DB Contractor regarding the assignment of responsibilities for safety precautions and

programs; temporary Project facilities and security; equipment, materials and services for common use of Contractors.

- **UPDATE THE MANAGEMENT INFORMATION SYSTEM**  
PM shall constantly update all information tracked in the MIS.
- **PREPARE A SCHEDULE OF OWNER PURCHASED MATERIALS**  
The PM shall investigate and recommend a schedule for the Owner's purchase of materials and equipment requiring long lead time procurement, and coordinate the schedule with the early preparation of portions of the Contract Documents by the DB Contractor.
- **PREPARE MOVE IN AND START UP PLAN**  
The PM shall assist the Owner in preparing a move-in and start up plan to bring the facility on line. The PM will insure that scheduled school openings will be in sync with the relevant schools calendar.
- **RESOLVE REQUESTS FOR INFORMATION**  
Consult with the DB Contractor and the Owner of any requests requiring interpretation of the meaning and intent of the Drawings and Specifications, and assist in the resolution of questions which may arise.

### **Construction Monitoring**

- **PM AUTHORITY**  
Do not authorize deviations from the Contract unless notified in writing by Owner. Latitude is given to the PM in order to minimize delays. Refer to details in document A201 "General Conditions of the Contract for Construction".
- **MONITOR ON-SITE PROJECT CONSTRUCTION ON A DAILY BASIS**  
New construction sites are to be monitored full time until exterior walls are finished and the roof is complete. Other construction operations are to be thoroughly inspected on a daily basis and be monitored full time during critical operations.
- **LIASON**  
Facilitate coordination between construction personnel and school district staff. Maintain liaison with the Contractor and all subcontractors on the Project only through the Contractor's superintendent. Coordinate access to areas and resolve issues relating to school operations, construction limits and disruption plans.
- **OBSERVATIONS**  
Conducts on-site observations to verify that work in progress conforms to contract. Report any non-conforming Work and other problems to the Owner and Contractor's authorized representative in writing as soon as possible.

- **SPECIFICATIONS AND CONTRACT REQUIREMENTS**  
Possess a thorough knowledge and familiarity with required standards, code requirements, contract requirements, and specifications.
- **DOCUMENT CONSTRUCTION PROGRESS**  
The PM shall have project progress photographs taken on a daily basis. Pictures of all underground and other 'hidden' construction detailing is also required. Provide electronic and hard copies, date and time stamped, by location, along with description of photo. Provide hard copies in 'album' format. Hard copies will be stored at Project Field Office and are to be updated on a bi-weekly basis.
- **MONITOR QUALITY**  
Determine in general whether the work of each Contractor is being performed in accordance with the requirements of the Contract Documents. Endeavor to guard the City against defects and deficiencies in the work and document same. Any deficiencies noted by the PM shall be forwarded to the Owner for review and comment immediately. As appropriate, request special inspections or testing, or make recommendations to the DB Contractor regarding special inspection or testing of work not in accordance with the provisions of the Contract Documents whether or not such has been fabricated, installed or completed. Work which does not conform to the requirements of the Contract Documents shall be brought to the attention of the owner immediately.
- **REJECTION OF WORK**  
If a situation arises during construction, which in the PM's view requires that Work be rejected, report such situation immediately to the Owner.
- **ADDITIONAL INFORMATION**  
Obtain from the appropriate sources additional details or information if and when required at the site for proper execution of the Work.
- **CONTRACTOR'S SUGGESTIONS**  
Consider and evaluate suggestions or recommendations which may be submitted by the Contractor and report them, with recommendations to the Owner for final decision.
- **CONSTRUCTION SCHEDULE**  
Be alert to the construction schedule and to conditions which may cause delay in completion or disruption to school operations, and report same to the Owner.
- **CONFERENCES**  
Attend and report to the Owner on all project conferences.
- **TESTS**

Prepare a list of required tests for each phase of construction activity for scheduling by Contractor. Advise the Owner in advance of the schedule of tests and observe that tests at the Project site which are required by the Contract Documents are actually conducted; observe, record and report to the Owner any all details relative to the test procedures.

- **COMMISSIONING**

Coordinate requirements of section 15900 “Controls and Instrumentation—Commissioning requirements”. Insure project is ready for such prior to commissioning. Advise Owner when tests are taking place. Witness and document commissioning process. Forward results to all relevant parties.

- **INSPECTIONS BY OTHERS**

If inspectors representing local, state or federal agencies having jurisdiction over the Project visit the site, accompany such inspectors during their trips through the Project, record and report to the Owner’s office the results of these inspections.

- **RECORDS**

Complete daily INSPECTORS FIELD REPORT (AIA Document G711), recording hours on the site, weather conditions, construction deliveries, condition of all site stored materials, list of visiting officials and jurisdiction, daily activities, decisions, observations in general, and specific observations in more detail as in the case of observing test procedures. Identify any areas contrasting contract requirements. Complete all information completely and accurately. Copies of completed INSPECTORS FIELD REPORTS are filed weekly with Owner.

- **SAMPLES**

Receive samples which are required to be furnished at the site; record date received and from whom, and notify the Owner of their readiness for examination; record Owner’s approval or rejection; and maintain custody of approved samples.

- **OWNER’S OCCUPANCY OF THE PROJECT**

If the Owner occupies the Project or any portion thereof prior to final completion of the Work by the Contractor, be especially alert to possibilities of claims for damage to Work completed prior to occupancy.

- **OWNER’S EXISTING OPERATION**

In the case of additions to or renovations of an existing facility, which must be maintained in operation during construction, be alert to conditions which could have an effect on the Owner’s existing operation. Bring such conditions to the Owner’s attention immediately.

- **LIST OF ITEMS FOR CORRECTION**

Maintain a rolling list of items of correction throughout the project. Review list at progress meetings.

- **EQUIPMENT**



For equipment purchased directly by the Owner the following shall be done upon delivery of such equipment:

Count the number of cartons and compare with freight bill. Check for the job label on the outside of all cartons.

If there is a shortage or if any of the cartons are obviously damaged, have the truck driver make a damaged notation or shortage notation on all copies of the freight bill at the time of delivery.

Record the date of delivery and supplier as listed on our equipment contracts.

Check the number of pieces of equipment, type and color for compliance with the contract and specifications.

If any concealed damage is discovered, call the delivery carrier within 15 days of delivery and request an inspection of the damaged goods.

Document this action in writing with the carrier and forward a copy of your correspondence to the Owner. Save the carton material from the damaged units for the inspection.

### **Costs & Economics**

- **DEVELOP CONTRACTOR PAY REQUEST PROCEDURES**

Review and processing of Applications by Contractors for progress and final payments. Make recommendations to the Owner for payment.

- **COORDINATE CHANGE PROPOSAL AND CHANGE ORDER PROCESSING**

Recommend necessary or desirable changes to the Owner, review requests for changes to insure accuracy/scope/cost, submit recommendations to the Owner, and if they are accepted, prepare Change Orders for the Owner's approval and signature.

- **ASSIST IN CLAIMS AVOIDANCE**

The PM shall assist the Owner in the resolution of disputes, which may arise with the DB Contractor.

- **MEANS AND METHODS**

The Project Manager shall not be responsible for construction means, methods, techniques, sequences and procedures employed by Contractors in the performance of their contracts, and shall not be responsible for the failure of any Contractor to carry out work in accordance with the Contract Documents.

### **Closeout**

- **MONITOR AND COLLECT RECORD DRAWINGS**

The PM shall verify the accuracy of record drawings, upon submission and that they are being maintained by the contractor during construction. The PM shall collect record drawings, O & M manuals, warranties and guarantees, and maintenance materials from

contractors and vendors and submit them to the Owner. Verify they are in the format specified prior to turnover.

- **SUBSTANTIAL COMPLETION**

When the Project Manager considers that the DB Contractor's work or a designated portion thereof is substantially complete, the Project Manager shall prepare a list of incomplete or unsatisfactory items for the owners review and schedule for their completion.

Advise the Owner when the Project or a designated portion thereof is substantially complete. Prepare a summary of the status of the work of each contract, listing changes in previously issued Certificates of Substantial Completion of the work and recommending the times within which Contractors shall complete uncompleted items on their Certificate of Substantial Completion of the work.

- **SUBSTANTIAL COMPLETION CERTIFICATE**

Issue (through owner) a Certificate of Substantial Completion of the Project or designated portion thereof, Substantial Completion.

After Substantial Completion and prior to Final Inspection verify that each punchlist item has been corrected and report findings to Owner.

Evaluate the completion of the work of the Contractors and make recommendations to the Owner when work is ready for final inspection. Secure and transmit to the Owner required guarantees, releases of liens and claims, manuals, records, drawings and maintenance stocks to the Owner. Verify that the Owner is in possession of all documents required by PROJECT CLOSEOUT and the requirements specified in each DIVISION of the Contract specifications. Obtain "Consent of Surety to Final Payment".

Upon completion of the above issue "Final Certificate of Completion" for execution by Owner, DB Contractor, and Program Manager. Obtain requisite signatures (school district administration and staff, contractor, PM and DPW) necessary for City of Manchester, NH Certificate of Completion.

## **RFP Sample Submission Requirements**

Provide each item listed below in binder format, with individually tabbed sections, labeled accordingly.

1. ***Cover letter,***
2. ***Table of Contents,***
3. ***Company overview***
4. ***Overall Approach*** – The firm must describe its approach to providing the specific required services, in particular the approach for provisioning for the level and nature of services required, their geographic dispersion and timely deployment. Provide names of personnel and resumes, including relevant experience, for the proposed project team. Provide an organizational chart identifying each of their respective roles.
5. ***Management Information System*** – Provide details of the MIS proposed for used. Describe its' function and benefits. Provide examples, from the MIS system, of all reports requested herein or that you feel would be beneficial to the management of the project. Provide a description of your experience with the system proposed.
6. ***Experience and References*** – Provide specific references for the proposed “Project Manager” leading the “on site” operations. List at least three previous contracts providing similar services, including the name of the firm or institution under contract, numbers and types of staffing provided, average tenure for positions provided, duration of contract and contact name and telephone number from whom more information may be obtained.
7. ***Existing Size and Diversity of In-house Staff*** – Identify existing numbers of employees by type (such as architect, engineer, draftsman, scheduler, expediter, clerical, etc.), location, if the firm has more than one location and average tenure by location. Provide information on the diversity of your work force by location and position level (such as management, clerical, journeyman, professional).
8. ***Off-Site Staff Qualifications*** – Show clearly any services that would be provided by off-site staff. Identify how communication between “off site “ services and dedicated project staff will occur. List key members your firm will commit to this project and identify the role each will provide in accomplishing the specified services, and where this staff will be located. Provide one-page resumes for each key staff member identifying their experience and role on similar projects.

9. ***Performance Record*** – Provide documentable evidence (not generalized marketing information) regarding performance on previous contracts; preferably consistent with the contracts identified in Section 1. List statistics on the number of projects managed, project dollar value, number and % completed on time, number and dollar value of change orders, average number of projects managed per project manager per year, number of accidents and safety violations, dollar value of any safety fines, and number and outcome of legal actions.
10. ***Financial Stability*** – Provide current balance sheet and income statement as evidence of the firm's financial stability and capacity to support the proposed contract.

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