

MSAD 15
SCOPE OF SERVICES
OWNER'S REPRESENTATIVE

Among the responsibilities of the Owner's Representative are the following:

A. GENERAL

1. Facilitate communications, teamwork and trust between the Owner, Contractor, and Architect, in conformance with Owner/Architect and Owner/Contractor agreements.
2. Prepare for and if requested attend monthly meetings of the Owner's Building Committee, participate in and keep a summary record of Committee deliberations.
3. Communicate as necessary with the Building Committee through the Superintendent of Schools.
4. Perform such other associated duties as are assigned by the Owner.
5. Help Owner understand material provided by the Architect and General Contractor, including the implications of recommendations.
6. Maintain project files as required by Owner.
7. Develop schedule and basis of compensation of Owner's Representative's deliverables and additional services, if any.

B. DESIGN PHASE

Support the Owner and Architect in the following tasks:

1. Attend and participate in meetings as required.
2. Meet with Owner and Architect regarding the following:
 - a. At the conclusion of the Design Development phase recommend to Owner regarding conformance with cost estimate and budget, schedule, document quality and stage of development, and other project criteria. Review project costs, including construction cost estimates, against budget and make recommendations for corrective action as needed, which may include "value engineering" or scope reduction.

C. BIDDING PHASE

1. Advise Owner as to the implications of addenda.
2. Assist the Owner in understanding filed sub-contract and General Contractor bid analysis.
3. Assist Owner regarding contract negotiation alternatives if warranted.

D. CONSTRUCTION PHASE

The Owner's Representative shall perform the following services during the construction phase.

1. Owner's Representative

The Owner's Representative shall be on the site approximately 10 hours per week, to monitor the progress of the work, and facilitate timely answers among the project team members and Owner, and to assist in the smooth progression of the work.

2. Schedule

Assist the Architect and Owner with review of the Construction Schedule developed by the General Contractor. Review weekly, or periodically as directed by the Superintendent of Schools, current critical issues, the updated schedule, and current RFI, Submittal, and Change Order logs.

3. Meetings

- a. Represent the Owner, as directed, at construction meetings.
- b. Attend bi-weekly or monthly progress meetings on site with the General Contractor and Architect; advise on procedures, progress, quality of work, and schedule. Review meeting minutes and track action items, areas of responsibility, due dates, and general accuracy.
- c. Attend monthly pay requisition meetings.

4. Progress

- a. Issue a monthly progress report to the Owner and Architect that includes an updated schedule (based upon schedules provided by General Contractor), as well as a discussion of current critical issues, general progress and quality of the work, potential problems, overall status of the project, and suggest solutions as required. If schedule may be or has been adversely impacted, suggest a recovery schedule and work collaboratively with effected parties,

- b. Meet with the Owner as requested to review and discuss construction progress and quality, and general conformance with the contract documents.
- c. Work with Owner to update project budget on a monthly basis, identify variances between actual and budgeted costs. Recommend corrective action.

5. Submittals, RFI's, Change Orders, Claims

- a. Review the Submittal Log to ensure that all submittals required by the contract documents are submitted and processed in a timely fashion. Report problems to the Owner.
- b. Work with the Architect and General Contractor to prioritize submittals for review based on lead times for materials addressed in given submittals.
- c. Review Change Proposals and Change Orders and advise Owner.
- d. Assist Architect and Owner in review, evaluations and documentation of claims and recommend actions to Owner.
- e. Review log of all Requests for Information (RFI) to assure that none are overlooked and that all are responded to in a manner that preserves the schedule and the budget. Problems shall be reported to the Owner.

6. Invoices and Payments

- a. Review all Invoices for Architect Services and make recommendations prior to approval and payment by the Owner.
- b. Review Monthly Progress Payments presented by the General Contractor and evaluate that amounts being invoiced are compatible with the progress of the Work and approved Change Orders. If the Owner's Representative believes that the invoice is inconsistent with the progress of the work he or she shall meet with the Architect to discuss the basis for the billing and propose adjustments if needed prior to making a recommendation to the Owner for approval of payment.

7. Record Drawings

Ensure that record drawings are being maintained.

8. Substitutions

Review with the Architect proposed substitutions of significant material or equipment and make recommendations to the Owner relative to quality, durability, cost, and schedule impact.

9. Field Work

6. Report project-related Contractor-Subcontractor relations, jobsite problems and job coordination issues to Owner.
7. Report to Owner any differences that may occur between the Architect and Contractor regarding execution of the work.
8. Inspect the work for the purpose of quality control and conformance with the drawings and specifications. Any deficiencies found will be discussed with the Architect for review as necessary.

G. POST-CONSTRUCTION PHASE

The Owner's Representative shall:

1. Observe final testing and startup of all utilities, systems and equipment. Coordinate items to be completed or corrected with the Architect and General Contractor.
2. Assist Owner in scheduling training for maintenance personnel on mechanical and electrical systems with the General Contractor. Review submittal to Owner of warranties, keys, record documents and operating manuals.
3. Review project close-out package with the Architect to verify that all requirements are satisfied.
4. Verify receipt of Certificates of Occupancy, completion of punch list items and review of Record drawings.
5. Review final pay application and recommend release of retainage based upon completion of the contract requirements.

H. WARRANTY PHASE

1. Coordinate requests for warranty work from Owner with Architect to aid timely completion of the required work.