

PROFESSIONAL SERVICES GUIDE

MINOR PROJECTS

11

PROFESSIONAL SERVICES GUIDE (PSG)

MINOR PROJECTS EDITION

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REFERENCES (REFER TO POSTED USF DESIGN AND CONSTRUCTION GUIDELINES)

USF BUILDING CODE ADMINISTRATION (BCA)
USF DESIGN & CONSTRUCTION GUIDELINES (DCG)
USF PROJECT MANUAL (UPM)
USF GENERAL CONDITIONS OF THE CONTRACT – PUBLIC BID AND DESIGN-BUILD (DCST) AGREEMENTS
USF PROFESSIONAL SERVICES GUIDE – MAJOR PROJECTS EDITION (PSG)
USF COST CONTAINMENT GUIDE (CCG)
USF CONSTRUCTION ADMINISTRATION GUIDE (CAG)
USF CAD GUIDELINES AND STANDARDS (USF-CAD)
USF BIM GUIDELINES AND STANDARDS (USF-BIM)
USF BIM PROJECT EXECUTION PLAN TEMPLATE (USF-BIM-EP)
USF PROJECT MANAGEMENT GUIDES (PMG)
USF FACILITIES PROGRAM GUIDE (FPG)

PROFESSIONAL SERVICES GUIDE

(MINOR PROJECTS)

ARTICLE 1 INTRODUCTION

- 1.1 The purpose of this [USF Professional Services Guide \(PSG\) -- Minor Projects](#) edition is to assist the Design Professional in providing services to USF. The **PSG** does not modify the scope of work or the contractual obligations of the Agreement between Owner and Design Professional (Agreement). For projects involving new construction and/or specialized systems, also refer to the [Professional Services Guide \(PSG\) -- Major Projects](#) edition.
- 1.2 This guide sets forth expectations for professional services, regardless of the form of the Agreement or Project Delivery method. Fee proposals are to include all services and tasks described herein unless specifically waived based on individual project needs.
- 1.3 The term “Contractor” is used interchangeably to mean General Contractor, Trade Contractor, Construction Manager or other entity responsible for construction.
- 1.4 Procedures and expectations may differ for projects assigned to a Continuing Service Design Professional and those assigned to a competitively selected Design Professional. These differences, if any, will be addressed during the fee negotiation process.
- 1.5 The [USF Cost Containment Guide \(CCG\)](#) and [USF Design & Construction Guidelines \(DCG\)](#) may be found on the USF Facilities Management website. These set forth minimum standards which must be reflected in the Contract Documents. It is not appropriate to simply reference these standards on construction documents.
- 1.6 Professional Services Evaluations
The Design Professional will be evaluated periodically by [USF Facilities Management \(USF-FM\)](#) while under contract. Written evaluations will be kept on file.

ARTICLE 2 THE OWNER

- 2.1 The Owner is the [University Of South Florida Board Of Trustees \(USF BOT\)](#), a Public Body Corporate. Authority to manage construction contracts is delegated to the USF Facilities Management Department.

ARTICLE 3 DESIGN SERVICES

- 3.1 **Protocol**
The [USF Project Manager \(USF-PM\)](#) represents the Owner and is the single point of contact for all communications with the Design Professional in administering a project. The Design Professional shall likewise assign a single point of contact for the project, who will be the channel for all communications with the Owner.
- 3.2 **Meetings and Minutes**
The Design Professional is responsible to record the minutes of all design and construction project meetings unless otherwise agreed and shall provide the minutes to the **USF-PM**.
- 3.3 **Design Schedule**
The design phases and durations will vary by project and will be established during the fee negotiation. The issuance of the [Purchase Order \(PO\)](#) commences the Design phase. Within **ten (10)** calendar days after issuance of the **PO**, the Design Professional shall deliver to the **USF-PM** a design schedule identifying the respective due dates for each submittal, based on the durations provided in the Fee Proposal. The design schedule shall end with submittal of the signed/sealed

Construction Document Submittal. The design schedule shall indicate all milestones and shall include 2-week intervals for Owner review of each phase, unless otherwise agreed.

3.4 Status Reports

The Design Professional shall submit to the **USF-PM** by the 5th day of each month, a report describing the progress that has been made since the prior report along with any action items required from the Owner.

3.5 Project Conditions

- .1 The Design Professional shall inspect the project area as needed to become fully acquainted with the existing conditions and will document all visible conditions which will affect the bids.
- .2 When requested and when available, USF record documents will be provided to the Design Professional. The Design Professional may rely on USF record documents for conditions which are hidden, those being limited to conditions inside of walls, below ground, and above hard ceilings to the extent that such conditions cannot be inferred from visible evidence.
- .3 In the event that additional information is needed which is not visible or available from USF record documents, the Design Professional is responsible to provide an additional services proposal to investigate and provide the necessary information.
- .4 The **USF-PM** will provide the Design Professional with existing information regarding asbestos and lead-based paint surveys or will contract separately for testing services when needed.

3.6 Boundary & Topographic Surveys, Geotechnical Investigation Services

- .1 The Design Professional shall consult with the **USF-PM** whenever site survey and/or geotechnical investigation is needed. If the information is not available from USF Archives, the Design Professional shall provide an additional services proposal for Site Survey and/or Geotechnical Investigation services.
- .2 Refer to the [USF Professional Services Guide \(PSG\) -- Major Projects](#) for detailed requirements for site surveys.
- .3 The Design Professional shall publish the site survey and/or geotechnical report in the Contract Documents. Site Surveys are to display the Surveyor's signature and seal.
- .4 Site surveys may be used as backgrounds for site improvement projects provided that unnecessary information is removed, typewritten survey information is oriented correctly on the sheet, and survey information does not graphically conflict with other information.
- .5 As-Built Site Surveys, when required by the project scope, are to be provided by the Contractor unless specifically approved to be provided by the Design Professional.

3.7 Cost Containment and Material Selection

- .1 The [USF Cost Containment Guide \(CCG\)](#) and the [USF Design & Construction Guidelines \(DCG\)](#) set forth minimum standards which must be reflected in the Contract Documents.
- .2 The Design Professional will select materials and equipment which are appropriate for the project, giving consideration to life cycle cost. Products which have not achieved a minimum of five (5) years of successful use in similar conditions shall not be used, unless approved in writing by the **USF-PM**. Roofing products require a longer proven history; the Design Professional will discuss these requirements with the **USF-PM**.

3.8 Shelter in Public Buildings

[Section 255.042 \(Shelter in Public Buildings\), Florida Statutes](#), provides that protective construction be provided to the fullest practical extent in public buildings. The Design Professional will consider the requirement and, if required, provide a fee proposal for design.

3.9 Federal, State or Local Government Participation

Whenever a project involves funding participation by governmental agencies, the Design Professional shall identify and incorporate the requirements into the Construction Documents.

3.10 Utility Service and Stormwater Requirements

The Design Professional shall ensure that all required utilities and services are in place or will be provided as part of the project. Securing the approval of local agencies, when required, is a basic

service. Some USF storm water systems have been designed as pressure gradient systems capable of creating back pressures on lateral tie-ins which must be identified and accommodated in the design of new connections.

3.11 Wage Rates

Stipulated construction wage rates are sometimes mandated for federally funded projects. When applicable, the Design Professional is to identify and include the requirements in the Construction Documents.

3.12 Code Compliance and Permits

.1 Building and Fire Code Compliance:

- i. The Design Professional is responsible to ensure compliance with all applicable codes and regulations, and shall provide signed/sealed documents to the **USF-PM** for submittal to the Building Code Administration Office for code review.
- ii. Plans and specifications shall include a list of the governing codes which have been incorporated into the construction documents. Refer to the USF Building Code Administration (BCA) web site for additional information.
- iii. Plan review by the USF Fire Code Official (FCO) will be coordinated by and through the **BCA** office.

.2 Other required permits include the following, where applicable:

i. City and County:

Agreements pursuant to [FS 240.155 \(Campus Master Plans & Campus Development Agreements\)](#) supersede local codes and ordinances. The Design Professional shall not initiate any local review process without authorization by the **USF-PM**.

ii. Environmental:

- a. Department of Environmental Protection (DEP), area District Office. All projects are subject to the requirements of the **DEP**. Coordination of the plan review and permitting is a basic service.
- b. Environmental Protection Commission (EPC). All projects are subject to the requirements of the Hillsborough County EPC. Coordination of the plan review and permitting is a basic service.
- c. Southwest Florida Water Management District (SWFWMD), area District Office. All projects are subject to the regulations of the water management district. Coordination of the plan review, permitting, permit modification, or permit exemption are basic services.

iii. Elevators:

Department of Business and Professional Regulation, Division of Hotel and Restaurants, Bureau of Elevator Safety: The contract documents shall require the Contractor to apply to the Bureau of Elevator Safety for approval of any work involving elevator equipment.

3.13 Construction Cost Estimates

The Design Professional is to provide a cost estimate with each phase review. Each estimate is to be based on the accompanying review documents and shall reference those documents by date. In the event that the cost estimate exceeds the budget, the Design Professional is required to submit suggestions to reduce the cost. In the event that the Owner elects to adjust the budget based on the Design Professional's cost estimate, written notification will be provided to the Design Professional. If the Owner opts to review the submission without the benefit of a cost estimate, the Design Professional incurs significant risk in further developing the plans, as major changes may be required to realign the project scope with the budget.

3.14 Owner's Supplier Diversity Program

USF is an equal opportunity institution, and, as such, strongly encourages the Design Professional's use of consultants and vendors who are certified as small or minority vendors. Assistance is available from the USF Supplier Diversity Program office regarding the certification process.

The USF Supplier Diversity Program
USF Purchasing Services
www.usf.edu/supplierdiversity
Telephone: 813-974-2481
Email: vendorapps@usf.edu

3.15 Specialized Systems

The Design Professional shall be responsible for initiating technical discussion early in the Project regarding Specialized Systems. Early submittals are to include narrative technical discussion of system types, materials, and controls; including options, advantages, disadvantages, relative costs, and Design Professional recommendations.

3.16 Central Campus Chilled Water and Hot Water Systems:

- .1 All projects considered for the USF Tampa Campus shall utilize the central campus chilled water (CW) and heating hot water (HW) systems for building cooling and heating (and when practicable, domestic hot water).
- .2 When requesting a deviation from the above requirement, the Design Professional shall perform, at no cost to the Owner, a Life Cycle Cost Analysis (LCCA) comparing at least three (3) distinctly different cooling and heating system options. Proposed options to be compared require Owner approval. The **USF-PM** will coordinate the review and provide written approval.

ARTICLE 4 DESIGN AND CONSTRUCTION DOCUMENTS

4.1 Deliverables:

The following submittals are required, as may be modified by the **USF-PM** according to specific project requirements:

- .1 Conceptual Design Owner Review
- .2 Schematic Design Owner Review
- .3 Design Development Owner Review
- .4 60% Construction Document Owner Review
- .5 100% Construction Document Owner Review
- .6 Final Construction Documents (Signed/Sealed)
- .7 Record Documents

4.2 Drawing Requirements:

All documents shall be developed in accordance with the USF CAD Guidelines and Standards (USF-CAD) available from the USF Facilities Management webpage.

- .1 Owner Review Submittals: Submit an electronic copy of the Owner Review Drawings to the **USF-PM** as a single bound .pdf set.
- .2 Final Construction Documents: Submit signed/sealed documents to the **USF-PM**, bound into a single .pdf before electronically signing/sealing. This set will be the basis for the Building Permit. In addition, submit the Final Construction Documents as described in Section 4 of USF-CAD.
- .3 Record Documents: Submit Record Documents as described in in Section 4 of USF CAD.

4.3 Project Manual / Specification Requirements:

- .1 Format:
 - i. The Project Manual is to be provided in 8 1/2" x 11" book format and shall include:
 - a. Division 0 (for publicly bid projects),
 - b. Division 1 (for all projects), and
 - c. Divisions 2-49 (as applicable).
 - ii. For projects of limited scope and complexity **USF-PM** may issue written approval to publish technical sections, as applicable, on the Drawings. If such approval is not provided, provide book format specifications.

.2 Content:

- i. The Design Professional shall prepare the Project Manual so that it complies with customary practices and is coordinated, complete, concise and free of redundancy.
- ii. Each Project Manual must be tailored to the project and may not include provisions which are not applicable to the project.
- iii. **Division 0** is required for Publicly Bid Projects and includes the USF Instructions to Bidders, Sample Contract, General Conditions, and when applicable: Supplementary Conditions, and other documents. The **USF-PM** will provide these sections to the Design Professional who shall review and suggest revisions as needed. If revisions to the **Division 0** documents are necessary due to the specific nature of the project, they shall be accomplished by use of Supplementary Conditions.
Note: the Design Professional is responsible to prepare a Contractor Qualification Statement to be submitted with the bid, and to clearly set forth minimum Contractor Qualifications in a **Division 0** specification section.
- iv. **Division 1** is required for all projects. For the convenience of the Design Professional, prototype Division 1 sections are provided in the **USF-DCG**. The Design Professional is required to **edit these for the specific project** and is ultimately responsible for the content of these sections.
- v. Technical specifications (**Divisions 2-49**) shall be prepared in accordance with the most recent **Construction Specifications Institute (CSI) MasterFormat** numbering system. Each section shall be formatted in three parts: general, products and execution.
- vi. In **Divisions 2 through 49**, do not repeat provisions contained in **Division 01**.

.3 Proprietary Specifications (single source products):

- i. The naming of a specific product is allowed only to establish a level of quality. Specifications shall not be proprietary unless specifically approved in writing by the University. **F.S Section 255.04** establishes the process for single source procurement.
- ii. When a specific product is listed for the purpose of establishing a level of quality, the Design Professional is required to list a minimum of three equivalent products, complete with model number. In addition, alongside the mention of any specific product, note that other equal products will be considered. Proposed equal products will not be evaluated prior to bid but rather during the standard submittal review process.
- iii. When a single source product has been approved by USF, substitutions of equal or better quality may be proposed if the event that the product is discontinued or otherwise unavailable. Proposed substitutions will be considered prior to bid as described in the General Conditions of the Contract for Construction.
- iv. Sole source specifications must be approved by the University in writing in accordance with **Section 255.04, Florida Statutes**.

ARTICLE 5 DESIGN SERVICES DURING BIDDING AND CONTRACT AWARD

5.1 Design Services during Publicly Bidding

- .1** The **USF-PM** will coordinate the posting of Final Construction Documents on the USF Procurement web site.
- .2** The Design Professional is responsible to specify reasonable minimum qualifications and to review the qualifications of the lowest **three (3)** bidders to ensure compliance, including contacting references, checking licensure, and similar tasks. The Design Professional shall issue a written recommendation to award to the lowest qualified bidder.
- .3** The Design Professional is required to attend the pre-bid meeting scheduled by the USF Project Manager and to accompany bidders to the job site to view conditions that may affect the performance of the Contract.
- .4** The Design Professional is required to respond to bidder questions within **twenty-four (24)** hours of receipt. The form of the response may be a short answer which will be posted on the USF Bid Page, or in the form of an addendum.
- .5** USF Procurement will advertise the Bid in the **Florida Administrative Register (FAR)**.
- .6** Prospective bidders are responsible to download and print bidding documents from the USF Procurement web page.

- .7 During the bidding period, addenda shall be issued by the Architect/ Engineer to clarify or modify the construction documents as necessary. Addenda shall be transmitted to the **USF-PM** no later than ten (10) days prior to receipt of bids for distribution to bidders.
- .8 USF Procurement will post the Notice of Intent to Award and will alert the Bidders of the procedures for filing a Bid Protest. USF Procurement will post the bid amounts for the information of the bidders within thirty (30) days after the bid opening. USF Procurement does not open bids publicly.
- .9 The **USF-PM** will coordinate the preparation and execution of the Contract.
- .10 The **USF-PM** will initiate the issuance of a **PO** and will issue a Notice to Proceed (NTP) to the Contractor.

5.2 Design Services during GMP Phase for Projects awarded to a Construction Manager

- .1 USF may elect to schedule a competitive selection process for certain projects or may award the construction contract to a Continuing Service Construction Manager (CM). The Design Professional has no role in the selection process.
- .2 If the scope of services for the selected **CM** includes preconstruction services, the Design Professional is required to forward information to the **CM** for cost estimating and constructability review and to meet as necessary with the **CM** to resolve questions.
Note: The **CM**'s preconstruction services do not reduce the Design Professional's responsibility for cost containment, selection of materials and products and other basic services.
- .3 Guaranteed Maximum Price Proposal Review: The **CM** will develop a Guaranteed Maximum Price (GMP) proposal based on the Final Construction Documents. The Design Professional is responsible to review the **GMP**, issue addenda to resolve all assumptions and clarifications, and to make a recommendation to the **USF-PM** regarding approval of the **GMP**.
- .4 Subcontractor Bidding Phase Services: During the subcontractor bidding period, the Design Professional is responsible to respond to written questions and to issue the necessary addenda for distribution to the sub-bidders.

5.3 Design Services for Projects Awarded to a Design & Construction Services Team (Design-Build)

USF may elect to schedule a competitive selection process to select a Design-Build Team. The expectations for the Design Professional component of the team the same as noted elsewhere in this [Professional Services Guide \(PSG\)](#).

5.4 Design Services during Competitive Bidding by Continuing Service Contractors

- .1 The Design Professional shall provide complete and biddable documents for distribution to the **CM** or Trade Contractors (Roofing, HVAC, Plumbing, and Electrical)
- .2 The Design Professional is required to attend the pre-bid meeting scheduled by the **USF-PM** and to accompany bidders to the job site to view conditions that may affect the performance of the Contract.
- .3 The Design Professional is required to respond to written bidder questions within 24 hours of receipt. The response must be issued in the form of an addendum if a clarification to the bid documents is needed to resolve the question.

ARTICLE 6 CONSTRUCTION ADMINISTRATION

6.1 General

- .1 The scope of construction administration services are set forth in the Agreement and referenced [USF Construction Administration Guide \(CAG\)](#). Basic services include but are not limited to:
 - i. Review of shop drawings, product data and other submittals
 - ii. Review of the Construction Schedule
 - iii. Site visits and field observation reports
 - iv. Clarification of Documents by Supplemental Instruction, RFI response, or similar
 - v. Construction meetings and meeting minutes

- vi. Issuance of Proposal Requests, review Change Proposals, and issue Change Orders
 - vii. Review of Schedule of Values, review and certification of Pay Applications
 - viii. Substantial Completion: Inspect, prepare Punch List and Certificate of Substantial Completion
 - ix. Final Completion: Inspect and execute Certificate of Contract Completion
 - x. Review of contractor close out documents
 - xi. Preparation and submittal of Record Documents
- .2 Construction Administration Services may be modified during fee negotiations for specific project needs.

6.2 Shop Drawings, Product Data, and other Required Submittals:

- .1 The Design Professional shall take action on construction submittals within seven (7) days per the Agreement.
- .2 The Design Professional shall provide a copy of each submittal to the **USF-PM** with all pertinent information bound into a single **.pdf** document. Submittals shall be stamped to indicate the action taken by the Design Professional.

6.3 Construction Schedule

- .1 The Design Professional shall review and monitor the contractor's compliance with the construction schedule.
- .2 The Design Professional shall ensure that a copy of the updated construction schedule is submitted by the Contractor with each Application for Payment.
- .3 The Design Professional's review of each pay application shall ensure that work is progressing in accordance with the provided schedule. If the construction schedule does not reflect the current status of the project, an updated schedule must be provided prior to certification of the pay application.

6.4 Site Visits

- .1 The Design Professional and any consultants who have work in progress shall visit the site as required by the Agreement and shall issue a Site Observation Report within 3 days
- .2 The Design Professional will endeavor to guard the Owner against defects and deficiencies in the work, and shall reject work which fails to conform to the Contract Documents.

6.5 Clarification of Documents

- .1 The Design Professional is required to respond promptly to written requests from the Contractor for clarification. The response may be issued on the Contractors Requests for Information (RFI) form or by Supplemental Instruction.
- .2 Responses which alter any requirement of the contract documents require approval by the USF Project Manager, regardless of whether the change will impact project cost or schedule. RFI responses shall include the statement:

"If this response represents a modification to the scope of the basic contract, the Contractor shall notify the Owner and Design Professional before proceeding with the work"

6.6 Construction Meetings

- .1 Preconstruction Meeting:
The Design Professional shall attend a pre-construction meeting as scheduled by the USF Project Manager.
- .2 Progress Meetings:
The Design Professional shall attend weekly or bi-weekly project meetings as scheduled by the **USF-PM**.

6.7 Proposal Requests and Change Orders

- .1 The Design Professional shall:
 - i. Issue a Proposal Request whenever a change is being considered.

- ii. Follow up with the Contractor to ensure timely delivery of the Proposal.
 - iii. Recommend to the **USF-PM** whenever slow response from the Contractor threatens to delay the Construction Schedule.
 - iv. Review the Contractor's proposal and make a recommendation as to whether the proposal is complete and fairly priced. Time extensions are to be reviewed against the Construction Schedule.
 - v. Prepare and execute the Change Order as a single **.pdf** with back up to include the Proposal Request, RFI (if applicable) and detailed cost breakdown.
 - vi. Route the Change Order to the **USF-PM** for further processing.
- .2 All changes in the work are to be properly documented by Change Order regardless of whether the project cost or schedule are impacted.

6.8 Applications for Payment and Schedule of Values

- .1 The Design Professional shall review Applications for Payment submitted by the Contractor, including review of the updated construction schedule, subcontractor back up and other supporting data. The Design Professional is required to sign each pay application to certify that all documents are in order, the project is on schedule, and release of payment is recommended.
- .2 Prior to the first Application for Payment, the Design Professional shall review the Contractor's proposed Schedule of Values (SOV) to ensure that it accurately reflects the distribution of costs in the project.
- .3 The Design Professional shall certify that:
- i. The current construction schedule is provided with the pay application and accurately reflects the progress of the work.
 - ii. Back up information is provided in the order that it appears on the **SOV**.
 - iii. Subcontractor pay applications are included, in the order that they are listed on the **SOV**, and the starting and current subcontract values which are shown on the subcontractor pay application match the value shown on the Contractor's **SOV** (exception: publicly bid projects do not require subcontractor back up). Copies of subcontractor change orders, when applicable, are to be provided.
 - iv. The work for which payment is requested is complete.
 - v. The appropriate amount of retainage is withheld.
 - vi. All Change Orders listed on the pay application have been approved by the Owner. Owner change orders which are still pending are not to be shown.

6.9 Substantial Completion

- .1 The Contractor is responsible to contact the Design Professional to establish a mutually acceptable date/time for the Substantial Completion Inspection. When the date/time has been selected, the Design Professional will provide a minimum of seven (7) days advance notice to the **USF-PM**.
- .2 The Design Professional may not proceed with the inspection if any systems are incomplete to the extent that the Design Professional cannot compile a list of specific deficiencies for the punch list.
- .3 When an inspection is not able to be performed due to the incomplete status of the work, the Design Professional may issue a field report but is not authorized in this case to issue a Punch list or Preliminary Punch List.
- .4 The Construction Contract provides that one Punch List shall be issued, which shall establish the substantial completion date and commence the Punch List period.
- .5 If the work is deemed to be substantially complete, the Design Professional shall prepare a Punch List for review and issuance by the **USF-PM**.
- .6 The Design Professional shall prepare and sign the Certificate of Substantial Completion and route it to the **USF-PM** for further processing.
- .7 Occupancy of the project shall not occur until substantial completion has been declared by the Design Professional and approved by the Owner.
- .8 In cases where deficiencies are discovered after the Punch List has been issued, an addendum to the Punch List may be issued.

- .9 Only in extraordinary cases shall beneficial occupancy be permitted prior to substantial completion of the project.

6.10 Final Completion

- .1 The Contractor is responsible to contact the Design Professional to establish a mutually acceptable date/time for the Final Completion Inspection. When the date/time has been selected, the Design Professional will provide a minimum of seven (7) days advance notice to the **USF-PM**.
- .2 Should the work be found to be incomplete or unacceptable, the Design Professional **shall not reissue** the Punch List. Inspection reports during the Punch List period, if needed, are to be issued as Field Reports.

6.11 Project Close Out and Post-Occupancy

Within thirty (30) days after work on site is complete the Design Professional is required to:

- .1 Review contractor close out submittals and report deficiencies for correction. Forward approved contractor close out submittals to the **USF-PM**.
- .2 Prepare Record Documents incorporating the contractor's marked field changes as well as all other changes. These include changes made by addenda, change order, contingency authorization, submittal review comment, RFI Response, Supplemental Instruction, etc.
- .3 Prepare and sign the USF Certificate of Contract Completion and route it to the Owner for further processing.
- .4 Schedule a post-occupancy inspection forty-five (45) days prior to the expiration of the one-year warranty period and shall prepare a report describing all items found to be deficient.

ARTICLE 7 FEES AND INVOICING

7.1 Fee Proposals

- .1 Fee Proposals are to include all basic services as listed in the Agreement and referenced guides. Any exclusion of a basic service which was not discussed and specifically approved in writing by the **USF-PM** is void.
- .2 Design Tasks are to be itemized in the fee proposal showing the fee associated with each task. Design Phases are to be listed as individual tasks.
- .3 Design Schedule: the overall duration from receipt of **PO** to delivery of signed/sealed construction documents is to be indicated in the fee proposal, as well as the individual durations of each task. Do not list specific dates since the issue date of the **PO** cannot be estimated at this point in the process. Preferred format is as follows:

Task	Task Duration	Total Duration
From Issuance of Purchase Order:		
Topographic Survey	2 Weeks	2 Weeks
Schematic/DD Submittal	4 weeks	6 weeks
Owner Review of Schematic/DD Submittal	2 weeks	8 weeks
60% Submittal	4 weeks	16 weeks
(etc.)		

- .4 Additional services which are incorporated into the original fee are to be itemized, for example, Topographic Survey, Subsurface Exploration, Measured Drawings, and similar services. Sub consultant proposals are to be provided as backup.

7.2 Additional Service Authorizations

- .1 The Design Professional may be asked to provide a proposal for Additional Services Authorization (ASA) during the course of the project, examples of which are listed in the Agreement. No additional services are to be performed without written authorization. Any additional work provided prior to such authorization is not eligible for compensation. If a portion of the services will be provided by consultants to the Design Professional, then the sub consultants' proposals are to be provided.

- .2 If the exact scope of work necessary to complete the additional service cannot be determined, USF may request that the Design Professional propose a not-to-exceed amount. Not-to-exceed authorizations may be billed monthly upon submittal of a detailed invoice, including timesheets, receipts, etc.
- .3 Additional Service fees shall be based on the maximum hourly rates established in the executed Professional Services Agreement.
- .4 Individual tasks associated with the additional service are to be itemized in the Additional Services fee proposal, along with the value of each task.
- .5 Additional Services may be invoiced upon completion of individual tasks and deliverables. These are to match those identified in the Additional Services proposal.
- .6 Approval of Additional Service proposals will be issued by the **USF-PM** and will be formalized by issuance of a revised **PO**.
- .7 Additional Services for prolonged contract administration shall be determined as follows:
 - **$((A \div B) \times 0.8) \times C$** = Additional Service amount.
 - **A** = the original contract fee for construction administration
 - **B** = the number of days in the original construction contract
 - **0.8** = the factor of **0.8** recognizes that the initial submittal review and the close out tasks are already considered in the basic services fee.
 - **C** = the actual number of construction days, minus the number of days in the initial construction contract.
- .8 Reimbursable Expenses: the Design Professional must submit an Additional Service proposal and receive written approval before incurring an expense for which reimbursement is expected. Items such as travel, photocopying, and postage costs are not reimbursable expenses with the exception of travel expenses which are required to perform an Additional Service; in which case, an allowance is to be itemized in the Additional Services proposal.

7.3 Invoicing

Invoiced amounts are to be broken down by task as shown in the approved Fee Proposal.

- .1 Invoices are to be submitted using the [USF Design Services Invoice PSG-Exhibit 12A](#) unless otherwise approved prior to the first invoice.
- .2 Sub consultant invoices are required as back up for basic services and additional services.
- .3 Invoices will not be held by USF until a work product is corrected or back up documents are provided, nor will errors be corrected by USF. In these cases, the invoice will be rejected.
- .4 All basic and other approved expenses shall be indicated on every invoice form. As additional services are authorized, they are to be added to the invoice form.
- .5 Invoices are submitted to the Administrative Services Business Center (ASBC) via the e-mail address printed on the **PO**. Invoices will be processed by **ASBC** and forwarded to the **USF-PM** for approval.

END OF PROFESSIONAL SERVICES GUIDE (PSG)