

University Project Coordination Services

The following is a brief overview of the type of services provided by the University's Architectural and Engineering Services during the course of development of a project. This is not a complete list but it will give an idea as to the degree of effort and involvement required.

Pre-design

- Meet with User (Group) to assess and document needs.
- Coordinate needs assessment with existing use, conditions and engineering systems (structural/mechanical/electrical).
- Liaise with Environmental Health and Safety Office to discuss health and safety requirements.
- Liaise with Audio Visual and Classroom Technology Support group to include appropriate equipment where required.
- Consider universal accessibility opportunities and requirements.
- Contact Information Services and Technology for voice communication and network connections.
- Produce a basic scope of work/program of requirements.
- Research and propose alternative construction/renovation solutions to meet these requirements.
- Provide a cost estimate of the proposed construction/renovation to the accuracy level requested.
- For larger scopes of work, or where insource resources are insufficient, engage an outside consultant team via a Standing Agreement or issuance of a specific RFP, with input from the end Users.
- Review and pre-qualify list of potential consultants to be invited to respond to U of M RFP.
- Create specific RFP tailored to project based on University standard RFP form, along with letter of invitation for issuing of the RFP by the Purchasing Department.
- Receive, review and analyze consultant RFP submissions. Present formal analysis and recommendation to U of M Administration and end User group.
- Compose Contract for successful Consultant and coordinate distribution and execution in accordance with U of M standards.
- Where the scale of project warrants a formal Program, work with the consultant and stakeholders to develop the detailed Program of Requirements.

Design

- Initiate and attend design meetings between User group, U of M Administration, U of M Fire Environmental Health and Safety Office (and Consultant, on larger projects), providing expertise and communication between the parties in accordance with U of M policies, procedures and standards.
- Coordinate needs and requirements of the U of M and User to produce a workable design; where an external Consultant team is engaged, facilitate their design work to the same end.
- Monitor costs (Insource or External Consultant generated estimates) to stay on budget as the design develops; assist with revision of budgets where necessary.
- Keep track of schedule (Insource or External Consultant generated timelines); monitor Consultants' milestone submissions.
- Coordinate all disciplines through design development and tender document production.

- Monitor, evaluate and provide comment on the key stages of the Consultant Tender Document production and related submissions.
- Distribute tender review documents, at each stage, to the appropriate Physical Plant personnel, EHSO, AVCTS and IST, for their expertise, input and comments; amass and coordinate the comments for use by the appropriate consultant.
- Assemble and submit the final tender package to the Construction Coordination group for Tender, Award, Construction and Post-construction phases.

Tender

For Larger Projects (typically over \$1,000,000.00)

- Prepare pre-qualification packages for issuance to pre-qualify potential contractors capable of bidding the work.
- Assemble packages with a letter of invitation and coordinate distribution with Purchasing Department.
- Receive, review and analyze contractor RFP submissions. Present formal analysis and recommendation of list of qualified contractors to U of M Administration and end User Group.

For Smaller Projects

- Assemble and prepare tender packages complete with letters of invitation as required for issuance by the U of M Purchasing Department.
- Issue Addendums through the tender period from Consultants through the Purchasing Department to bidders.
- Coordinate and direct queries from bidding contractors to appropriate Physical Plant personnel with respect to existing conditions services, U of M standards and policies with respect to the building or U of M standards.
- Organize site tours for bidders, coordinate access and invite all key U of M personnel with knowledge of the area being bid on.
- Receive bids through the U of M Purchasing Department; coordinate bid documents for forwarding to Consultants for analysis. At the same time Physical Plant will review bid documents and solicit comments from the appropriate Physical Plant managers with respect to sub-trade bids and costing as well as the appropriateness of the proposed sub-trades.

Award

- Review tender submission and consultant recommendations with the User.
- Issue Letters of Intent and regret to the bidders through the U of M Purchasing Department.
- Formalize a Contract with the successful bidder and execute bonding, insurance, Worker's Compensation Clearance, etc. with the Contractor.
- Execute the Contract with the Contractor and follow routing through the Purchasing Department to the University of Administration and when required, to the Board of Governors, returning signed copies and Purchase Order to the Contractor.

Construction

- Ensure Contractor has secured a building permit.
- Coordinate the start-up meeting with the Consultant and the appropriate University personnel (trades and end users).
- Establish University protocol, procedures, contacts and emergency numbers for the Contractor.
- Coordinate scheduling with the Users for use of spaces, buildings, services, etc. during the construction period.
- Coordinate decanting and relocation of existing spaces for areas scheduled for work or other construction use.
- Attend site coordination meetings offering University insight and expertise. Arrange for trade manager's input and expertise where required during the course of construction.
- Circulate for review shop drawing submissions for continuity with University standards and procedures.
- Provide a day-to-day contact / liaison for the Contractor ongoing throughout the project. This allows the Contractor a single source contact and access to appropriate University service personnel, Consultants as well as the User group.
- Arrange for any system or service shutdowns by U of M personnel as required during the course of construction.
- Arrange for outside consultant or inspection for quality control requirements such as concrete or material testing, roof inspection / testing and any mechanical / electrical systems testing.
- Arrange for special studies, audits or investigations as may be required prior to or during construction for such things as asbestos, condition of existing sewers, etc.
- Arrange for any system, material or other test witnessing required by U of M trades.
- Prepare Consultant's Proposed Change Notices for distribution, and coversheet and distribute to Contractor.
- Review Change Order costing with the Consultant offering expertise and working knowledge as input to the approval process. Review Change Orders based on Consultant recommendations and University expertise.
- Prepare Contractor Change Orders for approval based on Consultant's recommendations and circulate to signing authorities for signature and execution, forwarding with justification to Purchasing and issuance of U of M formal Change Order PO.
- Arrange for periodic inspections by Physical Plant trades in their area of expertise to provide comment and input on University standards and expectations.
- Keep the User's up to date with construction progress and address their concerns throughout the duration of the construction.
- Keep the budget signing authority up-to-date on costs and all changes to costing on an ongoing basis.
- Monitor budgets and keep in line with ongoing construction costs.
- Keep administration and where applicable, the Board of Governors up to date on progress through monthly reports.
- Process and provide paperwork required to execute the Contractor's payment certificate. This involves issuance of a standard University Payment Certificate form to Purchasing with the Consultant's recommendation for payment.
- Coordinate Substantial Performance Inspection with University trade personnel as well as liaison with User for inspection and feedback on their perceived deficiencies. Along with the consultant deficiency list, the U of M manages the execution of the final deficiency list.

- Coordinate commissioning of mechanical / electrical systems with University systems and personnel. Provide a single source contact for the contractors and the University.
- Coordinate final terminating and proving of all voice / data systems by University IST personnel.
- Assist / coordinate User's ordering of equipment and furniture: issuing tender packages and Purchase Orders, coordinating deliveries.
- Assist / coordinate User's move into spaces, including movement of existing furniture and equipment, telephone transfers, etc.
- Execute final payments to the Contractor after expiry of 40 day lien period, ensuring all requirements have been met and preparing and executing proper documents and paperwork.

Post Construction

- Coordinate transfer of Contractor bonding and insurance to Warranty period.
- Coordinate review and distribution of as-built drawings and operations and maintenance manuals by the appropriate University personnel as well as the Consultant.
- Address all User concerns during the move-in and after time frames.

Warranty

- Coordinate Warranty deficiencies, coordinating between the User, Contractor and where required, the Consultant.
- Ensure Warranty related deficiencies are cleaned up promptly and correctly.
- Coordinate a final inspection with the Contractor, Consultants and Users prior to expiry of Warranty.
- Coordinate the execution of and ensure all warranty related deficiencies generated at final inspection have been completed.