

PROFESSIONAL SERVICES GUIDE

MINOR PROJECTS

EDITION: JULY 1, 2020
USF

PROFESSIONAL SERVICES GUIDE (PSG)

MINOR PROJECTS EDITION

INDEX

ARTICLE 1	INTRODUCTION
ARTICLE 2	THE OWNER
ARTICLE 3	DESIGN SERVICES
3.1	PROTOCOL
3.2	MEETINGS AND MINUTES
3.3	DESIGN SCHEDULE
3.4	STATUS REPORTS
3.5	PROJECT CONDITIONS
3.6	BOUNDARY AND TOPOGRAPHIC SURVEYS AND GEOTECHNICAL INVESTIGATION SERVICES
3.7	COST CONTAINMENT AND MATERIAL SELECTION
3.8	SHELTER IN PUBLIC BUILDINGS
3.9	FEDERAL, STATE OR LOCAL GOVERNMENT PARTICIPATION
3.10	UTILITY SERVICE AND

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 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

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

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

- 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 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 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

- 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 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

- .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**

- .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)