

AE Collaboration

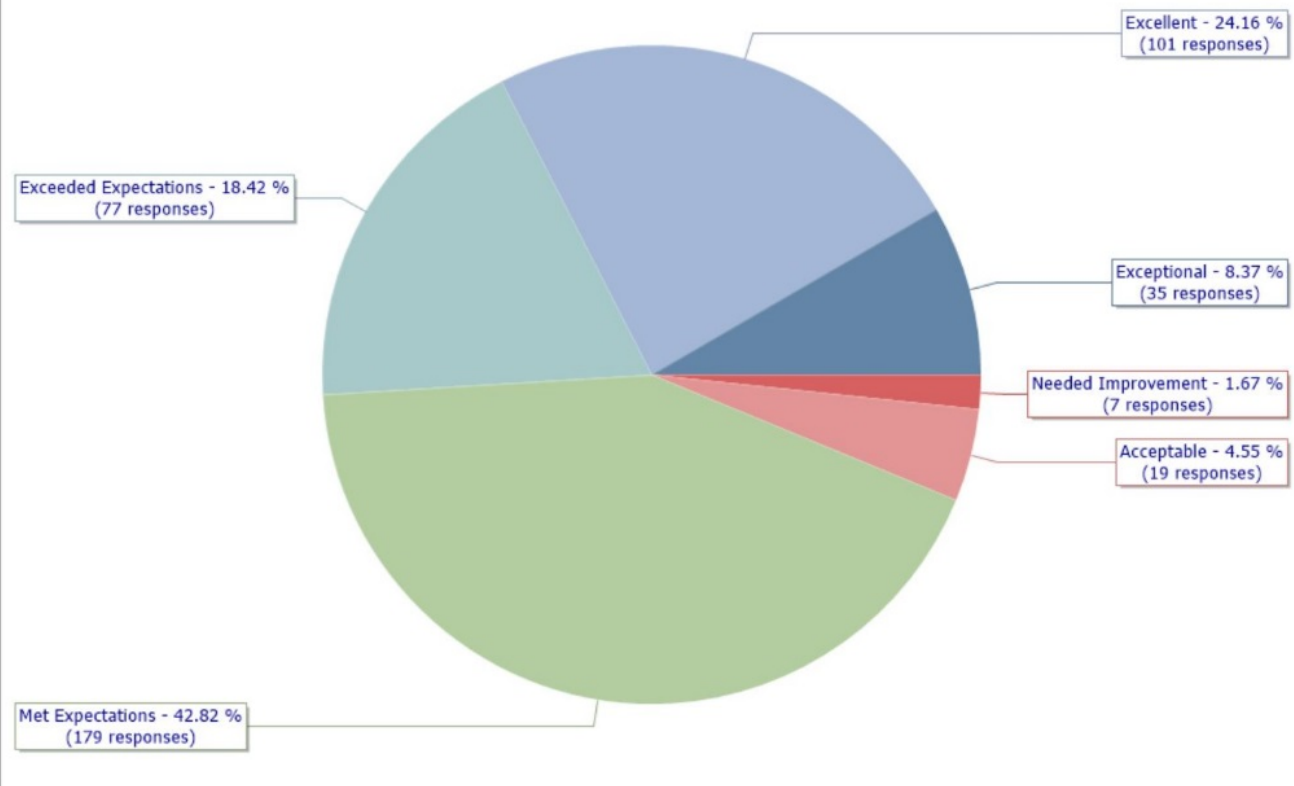
3 May 2019

Agenda

- Client Feedback Tool results 2018-2019
- AE Fee Estimate Rounding Initiative
- Status of SUCCESS Cost Estimating Software
- AE IDIQ Status and Plan
- Delegated Design Further Discussion
- Open floor

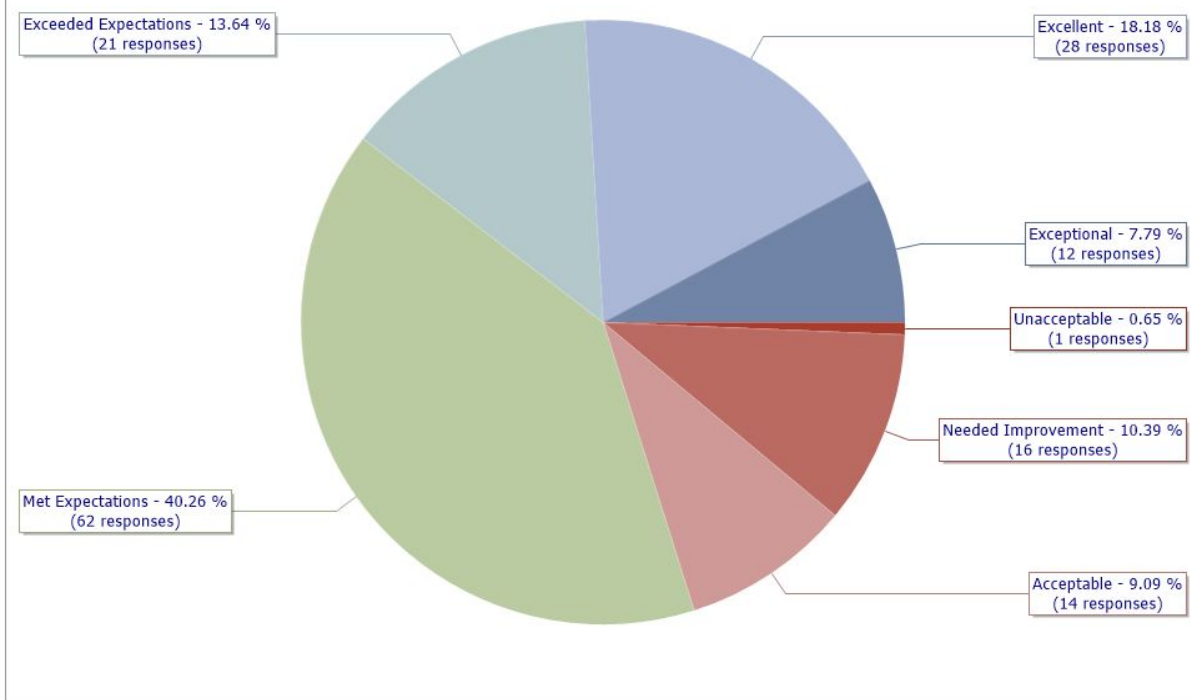
Client Feedback

April 2016-April 2018



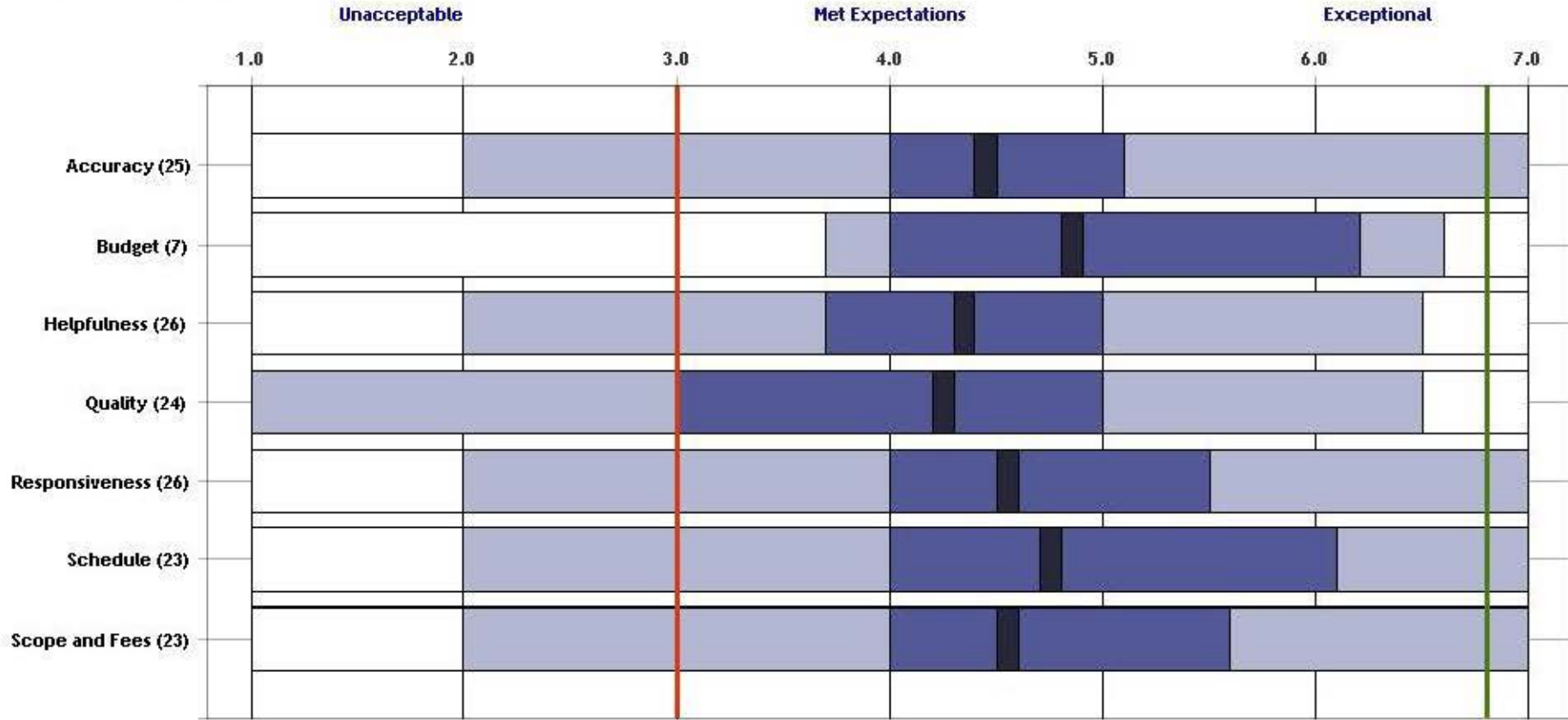
2017-2018

2018-2019




Advanced Report: Bar Graph Report, Graph By Question Category

Question Category (sample size)



Legend: No Responses in this range | Minimum and Maximum scores are in this range | 50% of responses are in this range | Average score

Advanced Report: Statistical Summary Report, Show By Category, Graph By Average Score

<u>Category</u>	Average Score	Percent Below Acceptable	Surveys Sent	Recipients	Respondents	Response Rate	Average Score
Accuracy	<u>4.4</u>	<u>12.0</u>	8	<u>100</u>	<u>28</u>	<u>28</u>	
Budget	<u>4.8</u>	<u>0.0</u>	6	<u>79</u>	<u>19</u>	<u>24</u>	
Helpfulness	<u>4.3</u>	<u>11.5</u>	8	<u>100</u>	<u>28</u>	<u>28</u>	
Other Comments	<u>0.0</u>	<u>0.0</u>	8	<u>100</u>	<u>28</u>	<u>28</u>	
Quality	<u>4.2</u>	<u>20.8</u>	8	<u>100</u>	<u>28</u>	<u>28</u>	
Responsiveness	<u>4.5</u>	<u>7.7</u>	8	<u>100</u>	<u>28</u>	<u>28</u>	
Schedule	<u>4.7</u>	<u>8.7</u>	8	<u>100</u>	<u>28</u>	<u>28</u>	
Scope and Fees	<u>4.5</u>	<u>13.0</u>	8	<u>100</u>	<u>28</u>	<u>28</u>	

AE Fee Estimate Rounding

Jaime Kurry

A/E Contracts

Beta Test: using whole dollar amounts

A/E Contracts

Beta Test: using whole dollar amounts

- Hourly rates remain unchanged
- Fee Proposal Template remains unchanged except for Summary Sheet
- Summary Sheet rounds each phase of work
- This allows total contract AND each invoice to be a whole dollar amount

Templates remain the same except for added lines for rounding

Project:										Estimated Construction Cost =			
Facility:													
										TOTALS			
		4.1		4.2		4.4		4.6A		4.6C		Remarks/Instructions	
		CODES, STANDARD S, & GUIDELINES		FIELD SURVEY AND EXISTING CONDITIONS		CONCEPT		65% CONSTRUCTION DOCUMENTS		100% CONSTRUCTION DOCUMENTS		ALL PHASES	
		Non-Title		Non-Title		Non-Title		Non-Title		Title		Non-Title	
		Non-Title		Non-Title		Non-Title		Non-Title		Title		Title	
PRIME's Loaded Labor Costs		\$636.44	\$1,467.97	\$9,080.17	\$6,771.04	\$1,256.97	\$4,634.06	\$1,093.03			Transfer labor totals for each phase for prime and each sub from Labor Worksheets.		
Subcontractors:		Discipline(s):											
		Food Service		\$0.00	\$0.00	\$10,331.45	\$5,406.49	\$0.00	\$3,818.07	\$120.38			
		MEP		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
		Structural		\$0.00	\$1,036.06	\$3,504.14	\$5,102.68	\$1,105.78	\$3,012.32	\$851.75			
PRIME'S PROFIT on Subs:		(profit % → 10%)											
TOTAL LABOR COST + PROFIT (per phase)		\$1,387.98	\$5,976.66	\$31,504.17	\$28,040.51	\$5,862.82	\$17,939.97	\$6,387.30			Total labor + profit cost per phase		
ROUNDED LABOR VALUES		\$1,387	\$5,977	\$31,504	\$28,041	\$5,863	\$17,940	\$6,387	\$8,849	\$12,250			
SUBTOTAL Subcontractor Loaded Labor Costs		\$6,231	\$4,098.81	\$20,385.45	\$19,335.88	\$4,387.14	\$12,096.28	\$4,812.97					
PRIME'S PROFIT on Subs:		(profit % → 10%)											
TOTAL LABOR COST + PROFIT (per phase)		\$1,386.98	\$5,976.66	\$31,504.17	\$28,040.51	\$5,862.82	\$17,939.97	\$6,387.30			Total labor + profit cost per phase		
ROUNDED LABOR VALUES		\$1,387	\$5,977	\$31,504	\$28,041	\$5,863	\$17,940	\$6,387	\$8,849	\$12,250			
PRIME's Reprographic Costs		\$0.00	\$641.30	\$885.87	\$212.51	\$0.00	\$424.54	\$0.00					
PRIME's Other Direct Costs		\$0.00	\$60.00	\$60.00	\$0.00	\$60.00	\$0.00	\$30.00			Transfer other direct cost subtotals for prime and each sub from SUBTOTAL Other		
Subcontractors:		0											
		\$0.00	\$30.00	\$30.00	\$0.00	\$30.00	\$0.00	\$0.00					
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					
		\$0.00	\$71.40	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00					
TOTAL ODC's + mark-up (per phase)		\$0.00	\$882.97	\$1,147.89	\$233.76	\$99.00	\$466.99	\$33.00			Total odc's + allowable mark-up per phase		
ROUNDED ODC's + mark-up		\$0	\$883	\$1,148	\$234	\$99	\$467	\$33	\$2,732	\$132			
ROUNDED CONTRACT VALUES (LABOR + ODCs + PROFIT):		\$1,387	\$6,860	\$32,652	\$28,275	\$5,962	\$18,407	\$6,420	\$87,581	\$12,382	GRAND TOTAL:		
											\$99,963		
											(Total Proposed Contract Cost)		
											Statutory Limitation for TOTAL Title I Services = \$0.00 (six percent of Estimated Construction Cost)		

Each phase is a whole dollar amount



<i>FOR PERIOD</i>	<i><date></i>	<i>>></i>	<i>INCLUSIVE</i>		
<i>A/E Services (attach task breakdown or itemized list as req'd)</i>	Total Contract Value per phase/task	Contract Value Complete to date	% Complete (as applicable)	Total Previous Requests for Payment	NET Amount due THIS Request for Payment
4.1 Codes, Standards, & Guidelines	\$1,387.00	\$1,387.00	100.00%		\$1,387.00
4.2 Field Survey	\$5,977.00	\$3,000.00	50.19%		\$3,000.00
4.4 Concept Design	\$31,504.00	\$8,000.00	25.39%	\$4,000.00	\$4,000.00
4.6A 65% Construction Documents					
Non-Title One	\$28,041.00		0.00%		\$0.00
Title One	\$5,863.00		0.00%		\$0.00
4.6C 100% Construction Documents					
Non-Title One	\$17,940.00		0.00%		\$0.00
Title One	\$6,387.00		0.00%		\$0.00
Other Direct Costs (Reimbursables)	\$2,864.00		0.00%		\$0.00
Total Value of Contract:	\$99,963.00	\$12,387.00		\$4,000.00	
					\$8,387.00

(rounded)
TOTAL AMOUNT DUE
on this Request for Payment **\$8,387**

A/E bills by dollar amount, again using whole dollars

<i>FOR PERIOD,</i>	<i><date> to <date> INCLUS</i>				
<i>A/E Services (attach task breakdown or itemized list as req'd)</i>	<i>Total Contract Value per phase/task</i>	<i>Contract Value Complete to date</i>	<i>% Complete (as applicable)</i>	<i>Total Previous Requests for Payment</i>	NET Amount due THIS Request for Payment
4.1 Codes, Standards, & Guidelines	\$1,387.00	\$1,387.00	100.00%		\$1,387.00
4.2 Field Survey	\$5,977.00	\$3,000.00	50.19%		\$3,000.00
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4.6A 65% Construction Documents					
Non-Title One	\$28,041.00		0.00%		\$0.00
Title One	\$5,863.00		0.00%		\$0.00
4.6C 100% Construction Documents					
Non-Title One	\$17,940.00		0.00%		\$0.00
Title One	\$6,387.00		0.00%		\$0.00
Other Direct Costs (Reimbursables)	\$2,864.00		0.00%		\$0.00
Total Value of Contract:	\$99,963.00	\$12,387.00		\$4,000.00	
					\$8,387.00

<i>(rounded)</i>	
TOTAL AMOUNT DUE	\$8,387
on this Request for Payment	

Percentage Complete calculates automatically, and will vary.
 Percentage Complete doesn't interact with other numbers.



FOR PERIOD.

<date> to <date> INCLUSIVE

A/E Services <i>(attach task breakdown or itemized list as req'd)</i>	Total Contract Value per phase/task	Contract Value Complete to date	% Complete (as applicable)	Total Previous Requests for Payment	NET Amount due THIS Request for Payment
4.1 Codes, Standards, & Guidelines	\$1,387.00	\$1,387.00	100.00%		\$1,387.00
4.2 Field Survey	\$5,977.00	\$3,000.00	50.19%		\$3,000.00
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Non-Title One	\$17,940.00		0.00%		\$0.00
Title One	\$6,387.00		0.00%		\$0.00
Other Direct Costs (Reimbursables)	\$2,864.00		0.00%		\$0.00
Total Value of Contract:	\$99,963.00	\$12,387.00		\$4,000.00	
					\$8,387.00

(rounded)
TOTAL AMOUNT DUE
 on this Request for Payment **\$8,387**

Questions

SUCCESS Cost Estimating

John Talkington

AE IDIQ Schedule

Mike Carrancho

Current DC IDIQ Expiration Schedule

2021

- 2 Large Business Architectural
- 1 8(a) Environmental Support

2022

- 4 Cx IDIQ contracts
- 2 8(a) Structural and Architectural

2023

- 4 Large Business Architectural
- 1 Small Business Architectural

2024

- 1 Small Business Architectural

Tentative New IDIQ Plan

2020

- Solicit for unrestricted Architectural IDIQ (Pick 3-4)

2021

- Solicit for Cx IDIQ contracts (Pick 4)
- Solicit for 8(a) Architectural and Engineering

2023

- Solicit for small business set aside Architectural IDIQ (Pick 3-4)

Delegated Design

Mike Carrancho/Jaime Kurry

Delegated Design & Design Assist

3.17 DELEGATED DESIGN AND DESIGN ASSIST

Unless otherwise stated in the A/E Scope of Work, and except as stated below, SI has contracted the A/E for a complete design as described in Section 1.1.

In some instances, it is in the best interest of SI to shift various design or engineering responsibilities to the General Contractor outside of a formal Design-Build contract, defined here as Delegated Design. In a Delegated Design, the General Contractor or their subcontractor shall provide sealed drawings and/or qualifications by a qualified, licensed engineer. The A/E shall provide clear requirements for those documents, and approve them.

In some instances, it is in the best of interest of SI to engage a qualified vendor, manufacturer, or subcontractor during design for the purpose of assisting the A/E with design or detailing of a specific portion of the project, defined here as Design Assist. In a Design Assist, the A/E shall provide sealed drawings, specifications, and/or calculations which have been informed by the Design Assist firm.

A/E shall confirm construction procurement method with SI prior to preparation of Contract Documents. Design-Build contracts shall not be subject to the requirements of paragraph 3.17. Design-Bid-Build construction contracts shall be subject to all requirements of paragraph 3.17. Other contracts shall be subject to the requirements of paragraph 3.17 as indicated herein.

Delegated Design & Design Assist

3.17.1 DELEGATED DESIGN

The A/E shall fully and completely design the project as indicated in the Scope of Work, including engineering of all components, except as indicated in this Section. Delegated Design, or the process of shifting various design or engineering responsibilities to the General Contractor outside of a formal Design-Build contract, is only permitted as noted herein.

3.17.1.1 Fire Sprinkler: Fire Sprinkler systems shall include delegated design by qualified designers, as indicated in Smithsonian Standard Specification 211316.

3.17.1.2 Fire Alarm: Fire Alarm systems shall include delegated design by qualified designers, as indicated in Smithsonian Standard Specification 283111.

3.17.1.3 Specialty Museum Systems: Individual systems with a high degree of specificity for museum use may be indicated in the Contract Documents as delegated design when approved by the COTR A/E. Examples of specialty museum systems include: lighting control systems and audio-visual exhibit systems. Any element indicated as delegated design shall be addressed in its entirety in a single specification section.

Delegated Design & Design Assist

3.17.1.4 Specialty Structural Elements: Elements which are not part of the primary structure of a building may be indicated in the Contract Documents as delegated design when approved by the COTR A/E. Examples of non-primary structural elements include: stairs, elevator beams, shoring, unistrut hanging systems, and curtain wall facades. Any element indicated as delegated design shall be addressed in its entirety in a stand-alone specification section.

3.17.1.5 In all cases, when Delegated Design is utilized, the Contract Documents shall clearly delineate the portion of work for which design is delegated, and the elements included in that portion of work. Specifications shall provide direction for: the required Qualifications of the specialty designer, including appropriate professional engineering licensure and sealing of submissions, Delegated Design Drawings, Calculations, Other required submittals, Prescriptive performance and design criteria of the system, which will be the basis for approval of the proposed solution

3.17.1.6 In projects with early contractor involvement, including but not limited to Construction-Management-At-Risk, multiple component assemblies that present a unique challenge or require specialized design experience may, at the approval of the COTR A/E, be indicated for Delegated Design in the Contract Documents.

Delegated Design & Design Assist

3.17.1.7. The A/E shall notify the COTR A/E for approval of all planned Delegated Design elements during preparation of the A/E fee proposal so that both COTR A/E and A/E have the same understanding of the design level of effort. During the preparation of Contract Documents, the A/E shall notify the COTR A/E for approval of any additional Delegated Design elements.

3.17.1.8 Components of the project designed using Delegated Design are still expected to be biddable in an open, competitive environment. Should any portion of the project associated with a Delegated Design carry an additional potential requirement for sole source justification, the COTR A/E shall be notified immediately.

Delegated Design & Design Assist

3.17.2 DESIGN ASSIST

The A/E shall fully and completely design the project as indicated in the Scope of Work, including engineering of all components. Design Assist is defined as engaging a qualified vendor, manufacturer, or subcontractor during design for the purpose of assisting the A/E with design or detailing of a specific portion of the project. Use of Design Assist shall be at the sole discretion of SI, and must be delineated by the COTR A/E in the Scope of Work. The A/E shall not seek Design Assist unless approval has been granted by the COTR A/E.

3.17.2.1 Use of Design Assist does not negate the A/E's ultimate responsibility for the Contract Documents. The A/E shall produce and stamp all Contract Documents.

3.17.2.2 Components of the project designed using Design Assist are still expected to be biddable in an open, competitive environment. Should any portion of the project associated with a Design Assist contract require sole source justification, the COTR A/E shall be notified immediately.

Questions