

# Modification of Agreement - #6

## Consultant Contracts

This Agreement is made this xx th day of November, 2014, in the City and County of San Francisco.

Whereas, the City & County of San Francisco and Jacobs Project Management Co., have entered into an Agreement for Executive Construction Management Services for the San Francisco General Hospital Rebuild Program and

Whereas, the parties now desire to modify the Agreement as described in Attachment A, now, therefore the parties agree as follows.

### The City will:

Add  Deduct the sum of \$ 4,474,706 for changes described in the referenced attachment.

Add  Subtract 0 calendar days To  From  the original Agreement or the latest modification as described in the referenced attachment.

In all other respects, the original Agreement and all modifications thereto shall remain in full force and effect.

**CITY & COUNTY OF SAN FRANCISCO**

**CONSULTANT**

Approved

\_\_\_\_\_  
Edgar Lopez, Division (or Bureau) Manager

\_\_\_\_\_  
Jacobs Project Management Co.  
Name of Consultant Firm

Approved

\_\_\_\_\_  
Mohammed Nuru  
Director of Public Works

\_\_\_\_\_  
160 Spear Street, Suite 330  
Address

Approved as to Form:  
Dennis J. Herrera  
City Attorney

\_\_\_\_\_  
San Francisco, CA 94105

\_\_\_\_\_  
By Deputy City Attorney

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
By (Signature)

\_\_\_\_\_  
Type Name & Title

**ATTACHMENT A  
CONTRACT MODIFICATION NO. 6**

Pursuant to Section 3 (Term of the Agreement), Section 6 (Compensation), and Section 34 (Modification of Agreement) of the Agreement (DPW Order No.: 177,756) between the City and County of San Francisco and Jacobs Project Management Co., the amount of the Agreement shall be increased by \$4,474,706 (Four Million Four Hundred Seventy Four Thousand Seven Hundred Six Dollars) for Executive Construction Management Services for the San Francisco General Hospital Rebuild Program.

Attachment A stipulates that the following sections (below) shall be incorporated into the Agreement between the City and County of San Francisco and Jacobs Project Management Co. Unless otherwise noted in this Contract Modification, all other terms and conditions in the Original Contract dated August 5, 2008 and all previously approved Contract Modifications, shall remain unchanged.

**SCOPE OF WORK:** Per the Base Contract, Jacobs Project Management Co. will provide executive project management services for the San Francisco General Hospital Rebuild Program. Services include the following:

Pre-Construction Phase Services: Construction Planning/Document Control Tasks; Budget/Cost Estimating/Cost Control Tasks; and Construction Scheduling/Schedule Control Tasks.

Construction Phase Services: Construction Administration/Document Control Tasks; Construction Scheduling/Schedule Control Tasks; Budget/Const Estimating/Cost Control Tasks; Inspector of Record Inspection, and Quality Assurance/Quality Control Inspection Tasks

Close-Out Phase Services

Post-Construction Phase Services

This modification is for additional estimated level of effort for continued executive construction management services, for the period of February 2015 through December 2016.

Appendix A – Scope of Work

**COMPENSATION:** Professional service fees for this contract shall be increased by Four Million Four Hundred Seventy Four Thousand Seven Hundred Six Dollars (\$4,474,706).

Appendix B – Calculation of Charges

**TOTAL COMPENSATION** (Fee + Reimbursables):

Twenty Million Eight Hundred Thirteen Thousand Nine Hundred Fifty Dollars (\$20,813,950)

**CONTRACT DURATION:** The contract duration for services under the Agreement shall remain unchanged.

**BILLING PROCEDURES:** Billing procedures remain unchanged and are per the Agreement dated August 5, 2008.

## APPENDIX A

### SCOPE OF WORK

The scope of work under this modification includes additional level of effort to provide continued executive construction management services, estimated for the period of February 2015 through December 2016. Tasks include but are not limited to construction phase services, close-out phase services, and post-construction phase services as outlined in the Agreement (EXHIBIT 1). The Consultant's estimated level of effort for the period of February 2015 through December 2016 is outlined in EXHIBIT 2.

Continuing usage of executive construction management services will be contingent upon annual review of Jacobs' performance. A performance review will be conducted and recorded in the 4<sup>th</sup> quarter of the fiscal year. The criteria for performance evaluation are listed in EXHIBIT 3, Department of Public Works Consultant Performance Evaluation Form (attached). In addition, on a monthly basis, a report which includes forecasted versus actual budget utilization will be submitted to the Program Manager, for review and evaluation.

## APPENDIX B

### CALCULATION OF CHARGES

**The Consultant acknowledges and agrees that, due to funding limitation at the time of this Modification, the Controller cannot certify the availability of funds for all of the services which the City intends the Consultant to perform under this Modification. The City will authorize the Consultant to perform only those services under this Modification covered by certified funds. The Consultant acknowledges and agrees that any service performed in excess of the value of the certified funds would be unauthorized and performed at the Consultant's own risk.**

FEE: Professional service fees for this contract shall not exceed Four Million Four Hundred Seventy Four Thousand Seven Hundred Six Dollars (\$4,474,706).

1. Actual performance shall proceed by task order. From time to time, the City will issue task orders to the Consultant. Each task order will identify the scope of work required by that order and specify a not-to-exceed amount. The Consultant shall perform only those services described in the task order.

Task Order No. 1 in this Modification, includes the following tasks covered by \$4,474,706 of certified funds (estimated budget for services during the period of February 2015 – December 2016):

#### **CONSTRUCTION PHASE SERVICES**

- Construction Administration/Document Control Tasks (See EXHIBIT 1, Task 2.A. from the Contract)
- Construction Scheduling/Schedule Control Tasks (See EXHIBIT 1, Task 2.B. from the Contract)
- Budget/Cost Estimating/Cost Control Tasks (See EXHIBIT 1, Task 2.C. from the Contract)

#### **CLOSE-OUT PHASE SERVICES** (See EXHIBIT 1, Task 3 from the Contract)

#### **POST-CONSTRUCTION PHASE SERVICES** (See EXHIBIT 1, Task 4 from the Contract)

- Reviewing, evaluating, validating, and reconciling construction cost estimates and project cost projections and escalations prepared by A/E Team and CM/GC + Design Assist Team participants to facilitate the establishment of a value-targeted budget and scope. Preparing independent cost estimates for all trade packages, including those for which the Core Subcontractors will submit a price.
- Providing detailed construction cost estimates for the major design phases: Schematic Design (SD), Design Development (DD), and Construction Drawings (CD). Participating in cost estimating sessions for reconciliation with the CM/GC's and the A/E Team's cost estimates.
- Providing independent cost estimates at 50% CD and 100% CD, including estimates for each bid package. Compare these cost estimates with the ones prepared by the A/E Team and reconcile the differences. Once the reconciliation process is complete, providing a report documenting the differences and the recommended construction cost.
- Providing cost budget, cost forecasting, and cost monitoring management services. Providing as-needed cost estimates at critical points of the DD to assure completion of the Project within the cost budgets approved by the City.
- Providing other as-needed cost analyses, cost estimating, and cost control services.

#### 1.C. Construction Scheduling/Schedule Control Tasks

- Preparing and monitoring the detailed baseline cost-loaded and resource-loaded SFGH Rebuild Program Master Schedule outlining all tasks and milestones between the SD and CD phases to facilitate and to track the design and financial status of the SFGH Rebuild Program. Baseline Schedules shall also be used to monitor and track all OSHPD and/or City and State-agencies that have jurisdiction over the plan review process.
- Providing monthly updates of the SFGH Rebuild Program Master Schedule. Preparing and submitting reports detailing the monthly updated cost and resource-loaded schedules for the Master Schedule and tracking the progress of the A/E Team through the SD, DD, and CD phases. The status reports shall include information pertaining to the current project schedule and cost expenditures compared to the as-planned baseline project schedule and cost budgets. Recommendations on how to recover from schedule slippages.
- Providing as-needed schedule updates during critical points of the DD and CD phases to assure completion of the design within the baseline schedule timeline. Providing recommendations, as necessary, to ensure that the Project can meet the schedule milestones.
- Preparing status reports regarding project schedule and budget and construction budget expenditures.
- All construction project schedules will be prepared utilizing the Critical Path Method (CPM) and the Primavera suite of programs (P3, P6, Contractor, etc.).

## 2. **CONSTRUCTION PHASE SERVICES**

#### 2.A. Construction Administration/Document Control Tasks

- Establishing and maintaining overall Project and Construction Controls Systems (PCCS) throughout the Project, including automated daily workflow processing and automated reporting. The PCCS will be implemented during the design phase to facilitate and document communication between the A/E Team, CM/GC + Core Subcontractors, the City, and other Consultants and will continue to be used throughout the construction to post-construction phases. PCCS to utilize common commercially available web-based database; ProLog Website, CMiC Collaboration software, or equal, which includes the following minimum features: change order and change order request tracking and management, contract management, CAD reader, Xref uploading, field administration, procurement, project dashboard, program dashboard, project reporting, project logs, tracking RFIs/submittals, document management and archival, redline tools, photo management, punch list, collaboration tools, and cost management.
- Providing access and support services to the A/E Team, CM/GC, the City, and other Consultants to the PCCS.
- Developing, implementing, and maintaining a project documentation system that will be utilized starting at Pre-Construction Phase and continue through the Post-Construction Phase to ensure that a comprehensive and complete of record of project documents is maintained at the completion of the project. This comprehensive and uniform project filing system will be used for tracking, reporting, recording all project documentation for the complete Project. All project documentation shall be scanned in the Adobe Acrobat format (.pdf) and archived onto DVD-Rom storage medias or equivalent, as approved by the City. At project completion, the Executive CM shall deliver the complete project documents, including copies of all scanned digital images, to the City.

## Appendix A (continued)

- Providing as-needed construction administration support.
- Establishing processes and procedures and roles and responsibilities of the Project Team to ensure the timely resolution of all issues, including but not limited to, RFIs, Submittals, Proposed Change Orders (PCOs), Change Orders (CO), Change Order Requests (CORs), Correction Notices, Non-conforming Work Reports, etc.
- Coordinating with CM/GC and A/E Team on the BIM reports/studies and coordination drawings.
- Participating in and recording Integrated Team constructability workshops, reviews and deliverables including Building Information Modeling reports and studies.
- Reviewing and advising on CM/GC's and its subcontractors' shop drawings, fabrication drawings, coordination drawings, submittals, and RFIs for compliance with the Contract Documents.
- Providing expert advice and recommendations on resolving technical and contractual issues and/or disputes that arise during construction between the CM/GC and the A/E Team.
- Reviewing, coordinating and recommending action on all deliverables and submittals from consultants, A/E Team, and CM/GC and Subcontractors on the project.
- Assisting with Community Outreach services.

2.B. Construction Scheduling/Schedule Control Tasks

- Reviewing and analyzing the CM/GC's baseline CPM schedules (cost and resource-loaded). Preparing and submitting reports detailing the review and approval of the CPM schedules.
- Reviewing and analyzing the CM/GC's monthly updated CPM schedules (cost and resource-loaded). Preparing and submitting reports detailing the review and approval of the CM/GC's schedules.
- Reviewing and analyzing the CM/GC's revised CPM schedules (cost and resource-loaded). Preparing and submitting reports detailing the review and approval of the CPM schedules.
- Preparing periodic progress status reports.
- Reviewing and commenting on all schedules submitted by the CM/GC, including "look-ahead" schedules.
- Providing schedule analysis of the impacts of proposed change orders and pending/approved change orders on the project duration and schedule.
- Preparing independent project schedules (as required) for the review and analysis of the CM/GC time impact analysis submittals. Reviewing and analyzing and providing recommendations to the CM/GC's request(s) for time extension.
- Preparing schedule updates and as-built schedules, as required, based on as-built/gathered data.
- Reviewing and negotiating change order requests and change orders as they relate to time impact to the construction schedule.
- Preparing status reports regarding project schedule and budget and as it relates to the construction activity progress and construction budget expenditures.

2.C. Budget/Cost Estimating/Cost Control Tasks

- Developing and implementing a tracking system for the monitoring the status of construction change orders, change order requests, and proposed change orders. Reviewing and advising the City on CM/GC's change order requests/proposals.
- Preparing independent cost estimates to evaluate the change order requests submitted by the CM/GC and Subcontractors. Negotiating change order requests and change orders for both time and cost and providing appropriate recommendations to the City.
- Preparing progress and financial status reports.
- Providing claims and schedule delay analyses.
- Preparing reports monitoring construction progress and construction budget expenditures.

2.D. ~~Inspector of Record Inspection~~, and Quality Assurance/Quality Control Inspection Tasks

- ~~Providing Hospital Inspector of Record (IOR) services to verify that the construction of the new hospital facility conforms to the approved plans and specifications and any approved change orders to those documents. The IOR shall attend weekly progress meetings with the City, CM/GC, A&E, and Executive CM.~~
- Supporting City Staff to monitor CM/GC's quality assurance/quality control (QA/QC) program.

- Developing a reporting system independent of the CM/GC's QA/QC program that tracks, monitors, and documents all work that require testing and inspection and all records of the entities that have inspected such work for acceptance.
- Developing a reporting system independent of the CM/GC's QA/QC program that tracks, monitors, and documents all non-conforming work reports (NCR) and OSHPD and IOR correction notices and correction of such NCR(s) and correction notices.
- Assisting with the coordination of the CM/GC's utility tie-in connections to existing facilities and campus services to minimize disruption to hospital operations.
- Establishing, providing, and maintaining daily and weekly digital photographic records of progress of the work, as needed and approved by the City. Where advantageous and upon request by the City, make digital video camera records of the work. (Note: if this task is included in the specifications as a Contractor's requirement, then the Executive CM shall coordinate and maintain the records.)
- Supporting City Staff in coordination of construction activities with SFGH campus and hospital operations and neighboring community.
- Assisting City Staff to coordinate testing and inspection with OSHPD, SF Building Inspection Department, SF Fire Marshall, and other Agencies having jurisdiction, including commissioning, project close-out, and functional and operational activities.
- The City and/or its other Consultants will be responsible for all special inspection services: (i.e. concrete, reinforcing steel, piling, drilled piers and caissons, in-place density tests, structural welding, high-strength bolting, base isolation, masonry, and spray-on fireproofing). The Executive CM will only be responsible for coordinating all such special inspection activities between the IOR, CM/GC, and the City and its Consultants.
- Reviewing the actual completed work and providing recommendations to the City as they relate to Contractor's payment requests. Monitoring and assisting City Staff in the approval of Contractor's progress payment.
- Performing quality assurance inspections, and miscellaneous field inspections required in the specifications, except those specifically noted to be performed by the CM/GC and its subcontractors. Witnessing, documenting, and preparing reports for all tests and inspections performed by CM/GC and its subcontractors.
- Managing, coordinating, and scheduling all inspections and testing services.
- Coordinating building commissioning services with CM/GC and Third Party Commissioning, as required to satisfy OSHPD and LEED requirements. Coordinating all OSHPD and LEED documentation and close-out activities.

### **3. CLOSE-OUT PHASE SERVICES**

- Coordinating all required OSHPD and LEED close-out documentation and other close-out activities as outlined in the Contract Documents.
- Working with the Third Party Commissioning Authority to ensure that all building commissioning documentation is complete and in compliance with the Contract Documents.
- Assisting and coordinating the implementation of the Building System Start-up and Building Commissioning process between the City's Commissioning Authority, Department of the Environment, A/E Team, IOR, and CM/GC and Subcontractors.
- Assisting the Commissioning Authority in documenting the Endurance Testing to be performed by the CM/GC and Subcontractors.
- Coordinating with the CM/GC and City Staff the training of operation and maintenance of building systems. Providing digital recordings of all such training for record purposes, unless otherwise determined to be performed by the CM/GC or others.
- Developing a system for the tracking of punchlist items. Coordinating with the CM/GC and Subcontractors on the timely correction and completion of all punchlist items. There shall be no outstanding punchlist items at Final Completion. Warranty work shall not constitute punchlist work.
- Coordinating and tracking the delivery of all spare parts, operation and maintenance manuals, warranty documents, training logs, as-built/record drawings, keys, and any other items necessary to the City.
- Assisting with Community Outreach services

### **4. POST-CONSTRUCTION PHASE SERVICES**

**EXHIBIT 1**

Appendix A (continued)

- Setting up a records and retrieval system designed for ease of use and information retrieval. Records shall include reports, test results, inspections, contract documents, change orders, change order requests, schedules, as-built/record drawings, billings and payment requests, cost accounting, and project correspondences including emails. An index shall be developed identifying the type of records and their location. At this time, it is envisioned that files will be boxed for archival storage and will include electronic files on DVD-Roms or other media. The storage system must be approved by the City.
- Maintaining and providing records in electronic format and hardcopy of all email correspondences of all staff throughout the project
- Assisting the City in ensuring that the CM/GC and Subcontractors honor their warranty responsibilities in a timely manner.
- Assisting the City in preparation for and depending against any and all legal claims and court suits.
- The Executive CM may be retained for a period of three (3) years after the completion of the Project, terminable at any time upon written notice from the City. The exact date for the commencement of this phase shall be mutually agreed upon by the City and the Executive CM, and may be dependent on various factors, including but not limited to: Certificate of Final Completion and Occupancy, all final payments, and resolution of issues connected with local, State, and Federal agencies.

***(THIS SECTION INTENTIONALLY LEFT BLANK)***



**SFGH Rebuild - JACOBS Staffing Plan**  
February 2015 - December 2016

Construction Period		2015												2016															
Substantial Completion	5/29/2015																									Hours	Dollars	LBE %	
Final Completion	9/26/2015																												
Owner Staff / Stock / Licensing																													
SFGH Open	12/5/2016																												
Day 2 Projects																													
FTE HOURS		FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2015 TOTALS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2016 TOTALS			
<b>FEE SCHEDULE</b>																													
Project Executive	Colson		16			16			16			16	64														64	\$ 13,750	
Project Manager	Hall	158	158	158	158	158	158	158	158	158	158	158	1742	158	158	158	158	158	158	158	158	158	158	158	158	1900	3642	\$ 720,461	
Scheduling Manager	Glasser		8			8			8			8	24														24	\$ 4,053	
Cost Manager	Stevenson	158	158	158	158	158	158	158	158	158	158	158	1742	158	158	158	158	158	158	158	158	158	158	158	158	1425	3167	\$ 541,958	
Scheduling	Koyada	158	158	158	158	158	158	158	158	158	158	158	1742	158	158	158	158	158	158	158	158	158	158	158	158	1900	3642	\$ 624,575	
Cost Estimating	Slaughter	158	158	158	158	158	158	158	158	158	158	158	1742	158	158	158	158	158	158	158	158	158	158	158	158	950	2692	\$ 454,242	
<b>SUB-TOTAL HOURS</b>		<b>633</b>	<b>657</b>	<b>633</b>	<b>633</b>	<b>657</b>	<b>633</b>	<b>633</b>	<b>657</b>	<b>633</b>	<b>633</b>	<b>649</b>	<b>7055</b>	<b>633</b>	<b>633</b>	<b>633</b>	<b>633</b>	<b>633</b>	<b>633</b>	<b>633</b>	<b>396</b>	<b>396</b>	<b>396</b>	<b>396</b>	<b>396</b>	<b>6175</b>	<b>13229</b>	\$ 2,359,039	
Consultant 5% Markup																												\$ 99,984	
<b>TOTAL JACOBS STAFF + MARKUP</b>																												<b>\$ 2,459,023</b>	
<b>GENERAL REQUIREMENTS</b>																													
Misc. Materials & Supplies		FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2015 TOTALS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2016 TOTALS	Hours	Dollars	
Misc		100	100	100	100	100	100	100	100	100	100	100	1,100	100	100	100	100	100	100	100	100	100	100	100	100	902		\$ 2,002	
Travel		3,500	3,500	3,500	3,500								14,000															\$ 14,000	
Subtotal Misc & Travel		3,600	3,600	3,600	3,600	100	100	100	100	100	100	100	15,100	100	100	100	100	100	100	100	100	102				902		\$ 16,002	
Chaves & Assoc, Doc Control		18,695	18,695	18,695	18,695	18,695	18,695	18,695	18,695	18,695	18,695	18,695	205,650	19,256	19,256	19,256	19,256	19,256	19,256	19,256	19,256	19,256	12,649	12,649	12,649	211,253		\$ 416,903	
Linda Royce	Hours	158	158	158	158	158	158	158	158	158	158	158	1742	158	158	158	158	158	158	158	158	104	104	104	1737	3479			
Luster, PE	Hours	23,195	23,195	23,195	23,195	23,195	23,195	23,195	23,195	23,195	23,195	23,195	255,143	23,891	23,891	23,891	23,891	23,891	23,891	23,891	23,891	11,945	11,945	11,945	11,945	215,016		\$ 470,160	
Steve Owsley	Hours	158	158	158	158	158	158	158	158	158	158	158	1742	158	158	158	158	158	158	158	158	1424.97				1424.97	3167		
Saylor Consulting, Estimating	Hours	80,844	80,844	80,844	80,844	80,844	80,844	80,844	80,844	53,238	53,238	53,238	806,467	27,496	27,496	27,496	27,496	28,321	27,496	27,496	23,392	23,392	23,392	23,392	23,392	306,151		\$ 1,112,618	
Brad Saylor	Hours	40	40	40	40	40	40	40	40	40	40	40	440	20	20	20	20	20	20	20						120	560		
Tim Coyle	Hours	169	169	169	169	169	169	169	169	169	169	169	1355														1355		
Vu Dang	Hours	169	169	169	169	169	169	169	169	169	169	169	1863	85	85	85	85	85	85	85	85	85	85	85	85	1016	2879		
Aaron Wong	Hours	169	169	169	169	169	169	169	169	169	169	169	1863	85	85	85	85	85	85	85	85	85	85	85	85	1016	2879		
Saylor Consulting, Estimating	Hours	548	548	548	548	548	548	548	548	379	379	379	5520	189	189	189	189	189	189	189	189	169	169	169	169	2152	7,672		
<b>MONTHLY CONSULTANTS</b>		1,999,681	122,734	122,734	122,734	122,734	122,734	122,734	122,734	95,129	95,129	95,129		70,843	70,843	70,843	71,488	70,843	70,843	54,583	54,583	54,583	47,888	47,888	47,888			\$ 47,888	
<b>MONTHLY JACOBS</b>		2,359,039	110,756	115,544	110,756	110,756	115,544	110,756	110,756	115,544	110,756	114,163		114,078	114,078	114,078	114,078	114,078	114,078	73,076	73,076	73,076	73,076	73,076	73,076			\$ 73,076	
<b>5% MARKUP CONSULT</b>		99,984	6,137	6,137	6,137	6,137	6,137	6,137	6,137	4,756	4,756	4,756		3,532	3,532	3,532	3,532	3,532	3,532	2,730	2,730	2,730	2,399	2,399	2,399			\$ 2,399	
<b>GENERAL CONDITIONS</b>		16,002	3,600	3,600	3,600	3,600	100	100	100	100	100	100		100	100	100	100	100	100	100	100	102						\$ -	
<b>TOTAL MONTHLY</b>		<b>4,474,706</b>	<b>243,227</b>	<b>248,015</b>	<b>243,227</b>	<b>243,227</b>	<b>244,515</b>	<b>239,727</b>	<b>239,727</b>	<b>244,515</b>	<b>210,741</b>	<b>210,741</b>	<b>214,179</b>	<b>188,354</b>	<b>188,354</b>	<b>188,354</b>	<b>189,220</b>	<b>188,354</b>	<b>188,354</b>	<b>130,499</b>	<b>130,499</b>	<b>130,501</b>	<b>123,460</b>	<b>123,460</b>	<b>123,460</b>			\$ 123,460	
<b>Total of General Requirements, Consultants &amp; Jacobs Mod #6</b>																												<b>\$ 4,474,706</b>	
<b>Current Contract Value Cap</b>																												<b>\$ 16,400,000</b>	
<b>New Total Contract Value</b>																												<b>\$ 20,874,706</b>	<b>34.18%</b>

CITY AND COUNTY OF SAN FRANCISCO  
DEPARTMENT OF PUBLIC WORKS  
CONSULTANT PERFORMANCE EVALUATION FORM

Bureau of Architecture

Bureau of Construction Management

Bureau of Engineering

Project Management

**PROJECT DATA**

J.O.# \_\_\_\_\_ Project Name: \_\_\_\_\_

Consultant Work Scope: \_\_\_\_\_

**CONSULTANT DATA**

Name & Address \_\_\_\_\_

Consultant Contact \_\_\_\_\_ Phone \_\_\_\_\_

Prime

Sub-Consultant

**CONTRACT DATA**

DPW Order # \_\_\_\_\_ PCS# \_\_\_\_\_

CSO# (if applicable) \_\_\_\_\_

Agreement Date (or CSO date) Start \_\_\_\_\_ Completion \_\_\_\_\_

Contract Amount (or CSO amount) Original \$ \_\_\_\_\_ Final \$ \_\_\_\_\_

**OVERALL RATING SUMMARY**

	Exceeded Standards	Satisfactory	Unsatisfactory
Quality of Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Responsiveness to Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budgetary Factors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Rating	_____		

**AGENCY SIGNATURES**

	Name	Signature	Date
Project Manager	_____	_____	_____
Program Manager	_____	_____	_____

\_\_\_\_\_

Route to: Division Manager

**DETAILED RATINGS**

Please check applicable boxes

E = Exceeded Standards

S = Satisfactory

U = Unsatisfactory

N/A = Not applicable

Item	Quality of Work	E	S	U	N/A	Item	Responsiveness to the City	E	S	U	N/A
A	<b>Project Construction Controls Systems (PCCS) Team Support</b>					I	<b>Timeliness of Invoice Submittal</b>				
	Metric:						Metric:				
	<ul style="list-style-type: none"> <li>PCCS system shall not have down time of more than 1% of construction time.</li> </ul>						<ul style="list-style-type: none"> <li>Invoices are to be submitted within 30 days of a billing period (Example: Invoice for services during the period of May 1 - 30, 2011, are to be submitted by June 30, 2011).</li> </ul>				
	<ul style="list-style-type: none"> <li>Jacobs IT is to respond to IT issues within 24 hours of notification from the City.</li> <li>Proposed solutions and level of effort estimate are to be submitted to City within 2 weeks of proposed modification or new task.</li> </ul>										
B	<b>Resource &amp; Contract Budget Management Efficiency</b>					J	<b>Timely Responses of Contract Tasks</b>				
	Metric:						Metric:				
	<ul style="list-style-type: none"> <li>Actual costs per year are not to exceed projection-based encumbrances. If exceeded, justification shall be provided.</li> </ul>						<ul style="list-style-type: none"> <li>Submittal Responses - Within 5 business days upon receipt of response from the Architect.</li> <li>CPM Schedule Analysis - Due on 3rd Thursday each month</li> <li>Document scanning/archiving - Duration between received date and e-file date shall not exceed 1 week, based on DPW spot check.</li> </ul>				
C	<b>Construction Budget Support</b>					K	<b>Timeliness of Deliverables</b>				
	Metric:						Metric:				
<ul style="list-style-type: none"> <li>Upon receipt of an RFPCO from the CM/GC, Jacobs will provide a draft analysis/recommendation within 72 hours.</li> </ul>					<ul style="list-style-type: none"> <li>Cost Estimates/Change Orders - Draft assessment due within 2 weeks after CM/GC submits a change order request.</li> <li>Monthly Report - Due on 3rd Friday each month.</li> <li>Meeting Minutes - within six (6) business days of OAC Meeting</li> </ul>						
D	<b>Clarity of Contract Task Communications</b>					L	<b>Communication &amp; Conflict Management / Teamwork</b>				
	Metric:						Metric:				
	<ul style="list-style-type: none"> <li>CPM Analysis - Jacobs is to provide understandable, succinct assessment and recommendation.</li> <li>Document Control - Documents are to be filed correctly per quarterly audits by DPW.</li> </ul>						<ul style="list-style-type: none"> <li>Manner of communication/support is to be consistent with Integrated Project Delivery approach.</li> </ul>				
E	<b>Completeness of Deliverables</b>					M	<b>Timeliness in Notifying City of Major Issues</b>				
	Metric:						Metric:				
<ul style="list-style-type: none"> <li>Deliverables are to be complete, with clear identification of contents, appropriate exhibits/components and concise executive summary. Examples are: cost reports, Monthly Reports, etc.</li> </ul>					<ul style="list-style-type: none"> <li>DPW is to be notified of major issues within the same day of Jacobs'</li> </ul>						
<b>Item</b>	<b>Budgetary Factors</b>	<b>E</b>	<b>S</b>	<b>U</b>	<b>N/A</b>						

							awareness.				
F	<b>Adherence to Fee Schedule</b>										
	Metric:										
	<ul style="list-style-type: none"> <li>Monthly invoice billing rates are to match rates in the Contract.</li> </ul>										
G	<b>Level of Effort Forecasting Accuracy</b>										
	Metric:										
	<ul style="list-style-type: none"> <li>Projected vs. actual cost analysis is to be completed bi-annually to confirm that actual costs do not exceed projected costs. If exceeded, justification should be provided.</li> </ul>										
H	<b>Clarity &amp; Thoroughness of Invoice Submittals</b>										
	Metric:										
	<ul style="list-style-type: none"> <li>Invoice revisions are to be less than 1 time per invoice.</li> </ul>										

**COMMENTS & SUPPLEMENTAL INFORMATION (OPTIONAL)**

Attach additional sheets and/or documentation as needed

Supporting documentation attached Yes  No

**Safety & Office Environment**

**Scope & Project Planning**

**Communication & Responsiveness**

**Technical Services Support**

**Staffing, Management & Support Services**

**Scheduling Services & Support**

**Cost Management & Estimating Services**

**Project Controls & Support Services**