

## 1. Overview

The following process is to be used in conjunction with the Design-Build (DB) or the Construction Manager at Risk (CMR) delivery methods. Design-Assist allows for the early engagement of specialty contractors to assist the design team with their construction knowledge and expertise for the CMR or DB delivery methods. They are not required to provide a licensed design professional, but work with the AE. Design-Assist firms may be prequalified and bid to perform portions of the construction.

## 2. Procure Services

### 2.1 Overview

- Services include: Planning and Scheduling, Estimating of Budget and Cost, recommendations regarding feasibility, constructability issues, availability of material and labor, alternative materials, time requirements for construction, safety issues, and preliminary budgeting
- Typically used for MEP and some specialty trades (ex. greenhouses, AV, & curtain wall)
- Procurement
  - Decision to use Design Assist should be made as early as possible. The CMR/DB RFQ and the AE RFQ should disclose the intent to use design-assist (best practice).
  - The OSU PM and the CMR will work together to determine if Design Assist will be utilized on the project and for which trades. A firm will be obtained for each trade.
  - The CMR/ DB procures the Design Assist services under the direction of the OSU project manager
  - Procured in a similar way to the subcontractors for the construction phase.
  - Contract timing could vary for trades based on the project
- The CMR/ DB may not provide Design-Assist services directly or through a CM/DB affiliated entity (*CMR/DB G.C. 4.8.1.1*)

### 2.2 RFP Phase

#### 2.2.1 Determine which trades will require Design Assist services

#### 2.2.2 CMR/DB submits [Pre-Qualification Criteria](#) (*CMR/DB G.C. 4.3 & 4.4*)

#### 2.2.3 CMR/ DB submits a “Prospective Bidders” list to the OSU PM (*CMR/DB G.C. 4.4.2*)

- Minimum of 3 firms (*CMR/DB G.C. 4.4.2*)
- The [Prospective Bidders list](#) is reviewed with the DoP prior to approval by PM
  - The PM may request additions or removals

#### 2.2.4 CMR/ DB creates the RFP and Bid Form (on their own form)

- The RFP and Bid Form is reviewed by the Architect/Engineer (AE), and the OSU PM
- The RFP should include the following:
  - Project Name and OSU number
  - Proposer contact information
  - Project Description
  - Estimated Cost of Construction
  - Description of Preconstruction Services
  - BIM requirements (BIM coordination if required)
  - GMP requirements/ description
  - EDGE requirement statement
  - Bid Form (which will include the following)
    - Preconstruction Stage: Pre-construction Fee (Lump Sum), Pre-Construction Personnel Costs, and General Condition Costs
    - Construction Fee: overhead and profit (Change Order fee %)
    - Cost estimates for performance of associated scope of work during the Construction Stage (optional: discretion of OSU PM) (*CMR/DB G.C. 4.8.2*)

- BIM coordination during design (determined by PM)
  - Hourly Rates for Preconstruction Staff
  - Construction Stage Staffing hourly rates
  - Safety questions
  - Commitment statement and Signature line
- RFP Attachments:
    - List of current design documents
    - Project schedule with milestones
    - State of Ohio Subcontract Form 00 52 34
    - Special conditions
    - Insurance requirements
    - OSU BIM execution plan (if required)

## 2.2.5 CMR/ DB issues RFP to “Prospective Bidders”

### 2.3.1 Conduct a Site Visit

- Follow-up site visits may be scheduled if necessary
- CMR will provide a sign-in sheet

### 2.3.2 Interview/ Scope review

- Interview a minimum of 3 (best practice)
- The AE and OSU PM shall participate in interviews
- Each firm will review its proposal and respond to questions about the proposal
- CMR will create a bid tab containing:
  - Preconstruction services fee (Preconstruction Stage Reimbursable Expenses, Preconstruction Stage Personnel Costs, and General Conditions Costs)
  - Construction phase fee % (overhead and profit mark-up)
  - Any additional fees that should be evaluated (ex. Subcontracted BIM services)

### 2.3.3 Selection

- Best value selection is made based on qualifications and price
- CMR/DB will submit a [Recommendation of Award](#), Bid Tab, and Exhibits (EDGE & SMSD) to the OSU PM for approval

## 2.3 Amendment-Preconstruction Services for CMR/DB

### 2.3.1 FDC Approval

- PM completes “[Technical Proposal Transmittal](#)”
  - Attach contracting documents
  - Obtain FDC Director of Projects (DoP) approval
  - Send to Contract Administrator to process the Amendment

### 2.3.2 Amendment

- Contract Administrator (CA) creates Amendment and sends to CMR for signature
  - Amend Article 2.2 to add an additional line item for each Design Assist Firm
- CA Reviews Amendment, Proposal, and supporting documents for compliance
- CA enters Amendment into the FDC Project Management system
- CA Routes for Approvals

## 3. Manage Services

### 3.1 Pre-construction Phase

- The Design-Assist firm shall be considered a consultant during the Preconstruction Phase (*CMR/DB G.C. 4.8.4.1*)
- No less than 10 days before Design-Assist services are performed, the CMR/ DB shall submit a Design Phase Subcontractor and Material Supplier Declaration (SMSD) to the AE (*CMR/DB G.C. 4.8.4.2*)



- The Contract Administrator will enter the SMSD into the Project management software and indicate “Design Phase only” and “No field labor” for each firm
- The Design-Assist firm does not assume any professional design liability (CMR/DB G.C. 4.8.3.2 and O.R.C. 153.501)

**3.2 Construction Phase**

- The Design-Assist firm shall be considered a subcontractor during the Construction Phase (CMR/DB G.C. 4.8.4.1)
- The Design-Assist firm may be awarded the construction work. In this case, the CMR/DB is not required to obtain bids for that trade.
- It is not required that the Design Assist firm perform the construction work. The Design Assist firm performing Construction Services is at the discretion of the OSU PM

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