

**1410333046 Owner Advisor Services for Water/Wastewater Capital Improvement Plan  
Appendix A - Scope of Work**

**Background**

JEA's Water/Wastewater five-year Capital Improvement Plan (CIP) is currently forecast in excess of \$1.5 billion and includes various types of utility infrastructure projects such as water reclamation facilities, water treatment plants, pump stations, rehabilitation projects and water, sewer and reclaim pipeline projects. This RFP is for Owner Advisor (OA) services in support of JEA's CIP.

An OA is a consulting firm that is employed by an owner to assist in various services related to the management and delivery of capital projects. These services could include specific services or encompass project lifecycle support. Essentially, the OA will bring specific management and construction experience to the project and be responsible for supporting JEA's implementation of the project.

The OA shall advocate for JEA's interests of quality, time, and costs while maintaining professional relationships with design and construction vendors.

**Scope of Services**

Services may include development implementation strategies, creating internal program materials for staff and executive management, risk assessments, market validation and strategy, program reviews, constructability reviews and reporting activities for various projects.

Without limitation, OA services may include any or all of the services listed below. OA services may be comprehensive, encompassing all required services from early project and budget development through final acceptance of all work, or may be limited to particular tasks or project phases.

- Acquisition strategy and development
- Provide expert project advice on collaborative delivery and program management contracts
- Provide industry expertise on changing market conditions to determine fair price when reviewing project costs
- Provide feedback for improving constructability and reducing costs during pre-construction and design phases of a project
- Stakeholder engagement and management
- Assisting in the development of contract terms and conditions and special provisions
- Risk assessment and management strategy
- Establish standard risk assessment methodology and risk sharing tolerance
- Risk register review and feedback
- Defining project objectives and priorities
- Identification of critical issues and obstacles impacting underperforming projects and contractors
- Preparation of monthly schedule update reviews and executive summary reports
- Attendance at construction kickoff meetings
- Contract negotiation support, including guidance and expertise in estimating/negotiating GMPs
- Development and management of procedures for periodic actual cost verification and GMP management
- Establish acceptable GMP cost breakdown formats
- Lead GMP negotiation meetings
- Review and provide recommendations on GMP change orders
- Cost monitoring
- Budget development
- Establish a standard risk register format
- Establish self-perform and subcontractor bid package guidelines including self-perform limits and competitive bid package procurement
- Assist in establishing JSEB guidelines
- Review contractor's proposed self-performance scope and bid packages
- Facilitating project meetings and progress reviews
- Dispute avoidance and resolution support services

- Review of project schedules and narratives
- Monitoring critical and near-critical paths, identify negative trends and lead efforts to recover or mitigate critical path delays
- Establish a format for comparison of cost estimates
- Review cost estimates by the contractor, designer and/or JEA
- Review of design documents and attendance at design review meetings
- Attend weekly OA updated meeting with JEA management
- Project completion/closeout support
- Development of uniform project schedule requirements
- Development of critical path management strategies
- Establish best practices for contingencies and allowances
- Attendance at monthly progress meetings

### **Equipment**

The successful respondent is responsible for providing all equipment necessary to perform the tasks described above. This includes office space, computer equipment, office supplies, software, vehicles and Personal Protective Equipment.

### **Work Performed by JEA**

JEA will assign a Manager to oversee the work performed by the successful respondent and provide support as needed. JEA will make available sufficient hours of staff personnel as is required to meet with the successful respondent staff and provide such information as required. Specific duties JEA may provide include:

1. Provide technical and policy support.
2. Provide successful respondent personnel with JEA-issued Identification Cards allowing limited access to JEA facilities.
3. Monitor all work performed by the successful respondent.
4. Provide administration of successful respondent contract.

### **Preclusion**

Because the OA could work on any project within the JEA CIP, the selected respondent shall be precluded from competing in other solicitations for engineering or construction services during the term of the contract. Respondents currently providing engineering or construction services as a prime contractor to JEA are also precluded. This stipulation will prevent potential conflicts of interest.