

# TERM CONSULTANT OMBUDSMAN MEETING AGENDA

## Role of Ombudsman

1. Single point of contact for general contract questions
2. Provide general familiarization with OGS D&C process and structure
3. Assist with identifying initial assignments
4. Assist with resolution of impasse issues
5. NOT involved with each assignment, fee negotiation, specific project issues or problems, etc.

## D&C Expectations of Consultant Team

1. Focus on communication- frequent status updates to Team Leaders; problem resolution oriented
2. Provide adequate staffing with appropriate skills for all accepted assignments
3. Consultant responsible to educate all team members on D&C policies and procedures
4. Comply with all schedule commitments
5. Perform quality assurance/quality control review of all deliverables
6. Comply with all appropriate codes and good-practice standards
7. Comply with OGS D&C standards, formats, etc.
8. Coordinate all trade and sub-consultant work for all deliverables; provide QA/QC for entire team
9. Focus on D&C's clients' needs
10. Accept project assignments ONLY when you can meet all the above criteria

## Consultant Expectations of D&C

1. Fair and reasonable fees for services rendered
2. Respect for consultant's knowledge and professional expertise
3. Additional fee for additional scope
4. Regular, reasoned feedback on consultant performance and improvement opportunities
5. Fair and reasonable project schedules
6. Term assignments with clear technical scope, duration, fee, and description of deliverables

## Design Services Issues

1. Project types- 40,000 series; 'Q'; 'S'; 'M'; JOCS
2. Lump sum vs. Not To Exceed assignments
3. No work shall be undertaken without a signed workorder
4. Compliance with Wickes Law
5. Hazmat responsibilities- self perform vs. use of D&C testing consultants, resolve with team leader
6. Geotechnical responsibilities- self perform vs. use of D&C survey consultants, resolve with team leader
7. Surveys- self perform vs. use of D&C survey consultants, resolve with team leader
8. Compliance with MBE/WBE goals- use sub-consultants appropriately, resolve with team leader
9. Review how projects are planned / administered. Ie: mini-set

## Project Phase Issues

1. Site visit- coordinate through team leader; contact EIC prior to visiting site
2. Program Reports
  - a. Understand the agency's project 'intent'. The program report's recommended scope should clearly satisfy 'intent'.
  - b. Presented to a wide audience
  - c. Use professionalism when given assignments - don't have a very narrow focus when going to sites
  - d. Program Report Template – prompts for writing programs
  - e. Program Report Checklist – prompts for project issues. Many projects go from the Program stage to the 100% Submission Phase.
  - f. Use the term "we" to include OGS and firm for recommendations, etc.
3. Bid Documents
  - a. Documents need to be complete and coordinated due to low bid environment, stress quality.

- b. Deliverables hard copies and electronic
- 4. 100% Submission requires QA/QC Certification Letter
- 5. OGS does most of the permitting
- 6. Consultants have little involvement in the bid phase.
- 7. Construction Support
  - a. Develop recommended number of site visits for each project with OGS TL & EIC. (Include specific number of site visits in Fee proposal.)
  - b. Errors & Omissions – no additional fees.
  - c. Site visit procedures
    - i. Complete site visits when requested by EIC.
    - ii. Fill out Site Visit Deficiency Log (BDC 151) for each visit

**General Discussion Issues**

- 1. Design Manual
  - a. Feedback and suggestions to improve procedures manual is encouraged & appreciated
  - b. Use of OGS master specs- institutional information but not necessarily up-to-date. Alternate specs may be used but must match OGS spec format. How to access OGS MasterSpecs.
  - c. When mixing various specifications use due care and coordinate
- 2. D&C Organization Chart- describe how groups relate (Design Business Unit, Project Control, Consultant Services, Div. Of Construction, Contract Administration). Assignments could originate in any design business unit, or in Div. Of Construction
- 3. Get to know individual OGS Team Leaders- project management styles and expectations vary
- 4. Client agencies' requirements and expectations vary. Discuss with the OGS Team Leader
- 5. Evaluations
- 6. Hand-Outs (Forms, Manual & Other Information)
  - a. OGS Design Organization
  - b. OGS Division of Construction Map & Information
  - c. Request for Term Assignment (BDC 41)
  - d. Request for Modification to Term Assignment (BDC 41.1)
  - e. Copy of the Design Procedures Manual
  - f. Document Review and Response Form (BDC 35.3)
  - g. Code Compliance Review Checklist (BDC 401)
  - h. Design Compliance Certification (BDC 401)
  - i. Design Compliance Certification Trades (BDC 403)
  - j. Site Visit Deficiency Log (BDC 151)
  - k. Consultant Evaluation (BDC 189)
- 7. Sample program reports