

SUBJECT: Basic and Additional Services for Major and Minor Projects	Effective Date: 1/19/24	Policy Number: FBO 2017 FS0013	
	Supersedes: 7/11/17	Page 1	Of 3
	Responsible Authority: Assistant Vice President (AVP), Planning, Design and Construction (PDC)		

APPLICABILITY/ACCOUNTABILITY:

This policy applies to all Facilities and Business Operations (FBO) employees responsible for negotiating professional fees on Major and Minor Projects.

POLICY STATEMENT:

FBO negotiates contracts for professional services for Major and Minor Projects in accordance with the Board of Governors (BOG) Regulation, Chapter 14 Construction Program, sections 14.001 Definitions and 14.008 Competitive Selection and Negotiation. This policy clarifies which professional services are Basic Services as compared to Additional Services, to help expedite the process of fee negotiations.

DEFINITIONS:

Professional Services: services within the scope of the practice of architecture, engineering, or registered land surveying, as defined by law, or those performed by any architect, landscape architect, engineer, or registered land surveyor

Department of Management Services Fee Schedule: a calculator produced by the Department of Management Services (DMS) and updated every three years, which computes a recommended design fee based on the complexity of a project (as defined by seven different categories labeled A to F) and the construction cost of the project

Basic Services: services necessary to produce a complete set of construction documents (drawings and specifications) for a project to be reviewed, bid, and constructed

Additional Services: specialty services that are not typically included in a project

POLICY:

Contracts for Professional Services shall be negotiated using the DMS Fee Schedule as a guideline for individual projects, or using the maximum hourly rates for Continuing Service Agreements and design criteria agreements. Fees for Professional Services shall be negotiated based on the level of complexity and the scope of services required, as well as on historical fee data.

FBO shall negotiate Professional Service fees as follows:

- The DMS fee schedule shall be used as a guideline and a starting point for negotiations on Major Projects.
- The DMS fee schedule shall be the maximum fee allowed for Basic Services. At no time will the Basic Service fee exceed the DMS fee schedule, without written approval from the AVP PDC.
- When using Continuing Service Contract professionals:
 - Project managers are required to obtain multiple fee quotes from the most qualified vendors, using the identical scope.
 - If questions are asked by one vendor about scope, any clarifications must be provided to all vendors.
 - Fee quotes from one vendor cannot be used to negotiate other vendors down in fee.
 - Cost is not the only factor in professional selection, but obtaining multiple quotes is necessary to ensure competitive fees. If the vendor with the low fee quote is not selected, a valid reason must be provided.
- Additional Services shall be evaluated and negotiated on a per project basis.

The following are considered Basic Services:

- Architecture
- As-Built drawings
- Audio/Visual design and coordination
- Basic Flythrough and Renderings to illustrate the design direction
- Basic Programming (working with Owner to develop spreadsheets of required spaces, room data sheets, relationship diagrams, and other information to begin Schematic Design)
- Basis of Design (BOD) at every phase, in response to the Owner's Project Requirements (OPR)
- Building Envelope Consulting
- Building Information Modeling (BIM)
- Design workshops as needed to deliver a complete project
- Civil Engineering (design, grading, paving, and utilities)
- Construction Administration, including:
 - Weekly Owner, Architect, and Contractor (OAC) meeting attendance by an Architect representative
 - Weekly OAC meeting attendance by Engineers when their Scope of Work is under construction
 - Weekly Architect/Engineer's field reports, including pictures illustrating construction progress and pictures illustrating any project deficiencies
- Coordination with Art in State (when required)
- Coordination with the Owner's Commissioning Agent during design and construction
- Cost Estimates (or, on a project with a Construction Manager (CM), checking of the CM Cost Estimates)
- Electrical Engineering
- Final completion requirements by UCF
- Fire Alarm Engineering
- Fire Protection Engineering (includes Full Design, not Delegated Design)
- Graphic and signage design
- Interior Design (interior layouts, finish selection, basic signage, and basic furniture layouts)

- Landscape Architecture (includes landscape, hardscape, and irrigation)
- Leadership in Energy and Environmental Design (LEED) Management – development and submission of all credits by the respective consultants to the USGBC in order to Achieve a LEED Gold Rating
- Life Cycle Cost Analysis
- Lighting Design (includes selection of specialty lighting fixtures and site lighting)
- Mechanical Engineering
- Plumbing Engineering
- Post-Occupancy inspections and evaluations
- Printing and postal expenses associated with Basic Services
- Record Documents (BIM, CAD, PDF) with all changes during construction incorporated
- Specialty Architect (such as a design architect that is part of a joint teaming approach)
- Structural Engineering
- Substantial Completion requirements by UCF
- Telecommunications Engineering
- Travel expenses associated with Basic Services

The following are considered Additional Services:

- Custom lighting design (design of unique lighting fixtures, approved by Owner)
- Enhanced or specialty wayfinding packages
- Extensive Graphic Design (custom wayfinding, custom banners or wallcoverings, branding, etc.)
- Extensive Programming (Duplicated or reworked programming efforts after Basic Programming is completed, or additional Owner-requested programming assistance above Basic Programming)
- Foodservice Consulting
- Furniture coordination, selection, and/or procurement
- Geotechnical Engineering
- Gopher tortoise evaluations and relocations
- Hazardous material inspections and remediation
- Indoor Air Quality (IAQ) Studies
- Master Planning
- Soils/Environmental reports
- Specialty flythrough and renderings; physical models requested by Owner
- Specialty Engineer
- Structural Threshold Inspection
- Surveys
- Third Party Commissioning
- Travel Expenses associated with Additional Services (pre-approved by the Owner, reimbursed at cost, and Not to Exceed the State of Florida Per Diem Expenses)

Approved By:	Date Approved:
<u>Jonathan Varnell</u> Vice President, Administrative Operations	<u>1/19/24</u>

