

Schematic Design Work Plan

Schematic Design Phase Item #	Original Request for Services	MSBA 963 CMR Reference	April 2008 MSBA Feasibility Study Guidelines Reference	MSBA D/B/B Contract Reference	Scope Description (Task)	By Owner or OPM	Architect Hours	Subconsultant Fee	Extra Services	MSBA	Approval Required before Subsequent Phase
1					MSBA Approval To Proceed					X	
2	X				SD to include information required by the MSBA Feasibility Study Guidelines	X	X	X		X	
3				7.4.1	Meet with the Owner to arrive at a mutual understanding of requirements of the Final Design Program approved in writing by the Owner and the MSBA.	X	X				
4				7.4.2	Work Plan Schedule of Values - Basis of Payments of the Fee for Basic Services	X	X	X		X	
5				7.4.2	Project Design Schedule - Critical Path	X	X	X		X	
6				7.4.3	Preliminary evaluation of the Recommended Preferred Solution, the Final Design Program, and the Proposed Total Project Budget		X	X			
6a				7.4.3	Collect and study all available drawings, reports, maintenance reports, and other data		X	X			
6b				7.4.3	Conduct a thorough on-site review of conditions		X	X			
6c				7.4.3	Assure that the Recommended Preferred Solution complies with codes, including design standards of the Authority and its Commissioning Agent		X	X			
6d				7.4.3	Meet with local Building Officials		X	X			
7			1.16	7.4.4	Develop the Recommended Preferred Solution to a full Schematic Design Level. Incorporate Owner and Authority comments	X	X	X		X	
7a				7.4.4.a	Siting Analysis - including content, traffic and access, topographic and utilities recognition		X	X			
7b	X		1.16	7.4.4.b	Site Development Plan - 1 inch = 40 feet		X	X			
			1.16	7.4.4.b	Wetlands information		X	X			
			1.16	7.4.4.b	Proposed and existing topography		X	X			
			1.16	7.4.4.b	Proposed and existing buildings and site features		X	X			
			1.16	7.4.4.b	Floor and roof elevations		X	X			
			1.16	7.4.4.b	Proposed and existing utilities and utility connections		X	X			
			1.16	7.4.4.b	Emergency equipment access		X	X			
7c				7.4.4.c	Traffic Analysis		X	X	X		
7d	X		1.16	7.4.4.d	Environmental Assessment - additional site and building assessments as may be required by the MSBA to quantify presence of unsuitable materials and scope of possible remediation efforts		X	X	X		
7e			1.16	7.4.4.e	Geotechnical and Geoenvironmental Analysis - additional geotechnical analysis as may be required by the Owner or the Authority to describe soil conditions, remediation requirements, and appropriate foundation.		X	X	X		
7f				7.4.4.f	Program Analysis - verify compliance with Final Design Program		X				
7g	X		1.16	7.4.4.g	Code Analysis		X	X			
			1.16	7.4.4.g	Listing of permitting		X	X			
			1.16	7.4.4.g	Listing of other regulatory filing		X	X			
7h	X		1.16	7.4.4.h	Utility Analysis		X				
			1.16	7.4.4.h	Soils Analysis		X	X	X		
			1.16	7.4.4.h	Preliminary design for on-site septic/ sewage treatment facilities		X	X			
7i				7.4.4.i	Massing study - drawings, models, photographs		X				

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7j	X		1.16	7.4.4.j	Schematic Building Floor Plans - floors and roof		X			
7k	X		1.16	7.4.4.k	Schematic Exterior Building Elevations - all sides; indicate fenestration and exterior materials		X			
7l	X		1.16	7.4.4.l	Building Systems Descriptions					
			1.16	7.4.4.l	Written Narrative				X	
				7.4.4.l	Schematic Plans				X	
7l(1)			1.16		Sustainable Design Elements - written narrative		X			
7l(2)			1.16	7.4.4.1.1	Building Structure - written narrative		X	X		
				7.4.4.1.1	Feasible options for foundations and superstructure;		X	X		
7l(3)			1.16	7.4.4.1.2	Plumbing and HVAC		X	X		
			1.16	7.4.4.1.2	Written Narrative - proposed fuel source(s)		X	X		
				7.4.4.1.2	Preliminary Life cycle cost pursuant to criteria of M.G.L.		X	X		
				7.4.4.1.2	Schematic plans		X	X		
7l(4)			1.16	7.4.4.1.3.	Fire Protection		X	X		
			1.16	7.4.4.1.3.	Written Narrative		X	X		
				7.4.4.1.3.	Schematic plans		X	X		
7l(5)			1.16	7.4.4.1.4	Electrical (including power, lighting, communications, fire alarm, video/CATV, security/ surveillance)		X	X		
			1.16	7.4.4.1.4	Written Narrative		X	X		
				7.4.4.1.4	Schematic plans		X	X		
7l(6)			1.16	7.4.4.1.5	Information Technology		X	X		
			1.16	7.4.4.1.5	Written Narrative		X	X		
				7.4.4.1.5	Schematic plans		X	X		
7m	X		1.16	7.4.4.m	MA-CHPS Scorecard		X	X		
			1.16	7.4.4.m	Describe each prerequisite and credit		X	X		
				7.4.4.m	Describe sustainable design features		X	X		
				7.4.4.m	Plan for public utility energy conservation design programs		X	X		
7n	X		1.16	7.4.4.n	Outline Specifications - Uniformat and MGL c. 149 files sub-bid format, incl. identify the sub-trades per c.149		X	X		
7o				7.4.4.o	Accessibility analysis - ADA, MAAB		X	X		
7p	X		1.16	7.4.4.p	Project Schedule - in addition to the schedule in 7.4.2		X			
				7.4.4.p	Design-related input to the OPM					
7q				7.4.4.q	Construction Cost Estimate		X	X		
			1.16	7.4.4.q	Uniformat II Level 2 - unit rates and quantities for each item		X	X		
				7.4.4.q	Cost reconciliation process with OPM estimate		X	X		
8				7.4.5	Schematic design phase drawings, specifications, construction cost estimates subject to written approval of the Owner	X	X	X		
					6 set of submittals to Owner	X				
					2 sets of submittals to MSBA					X
9				7.4.6	Schematic Design presentations		X	X		
					Owner, OPM, and MSBA	X	X	X		X
					Local public meeting	X	X	X		
10				7.4.7	Meetings with Owner every other week	X	X	X		
11				7.4.8	Meeting with Owner to finalize:	X	X			
					Design work plan					
					Project Schedule					
					Schedule of values					
				7.4.8	Meeting with Owner to execute an amendment to the Contract for subsequent phases of the Designer's services.	X	X			