

**SUMTER COUNTY BOARD OF COMMISSIONERS  
EXECUTIVE SUMMARY**

**SUBJECT:** ZHA proposal for construction management services of the Public Works North Annex (Staff recommends approval).

---

**REQUESTED ACTION:** **Approve**

- Work Session (Report Only)  
 Regular Meeting

**DATE OF MEETING:** 11/27/2012  
 Special Meeting

**CONTRACT:**  N/A

Effective Date: 11/27/2012  
Managing Division / Dept:

Vendor/Entity: ZHA  
Termination Date: 10/31/2013  
Public Works Division/Facilities Development  
Department

**BUDGET IMPACT:** \$23,502.00

- Annual  
 Capital  
 N/A

**FUNDING SOURCE:** Capital Outlay Revenue  
**EXPENDITURE ACCOUNT:** 305-340-541-6232

---

**HISTORY/FACTS/ISSUES:**

This proposal for \$23,502.00 from ZHA will provide construction management (CM) services for the Public Works North Annex facility project. The general scope of work will be to provide Sumter County with CM services during the design phase, the RFP phase, and construction phase of the project as delineated in sections A, B and C of Facilities Development Task Order November-2012-11 (see attached).

ZHA was awarded a contract to provide on-call project management services to the County on April 10, 2012. Staff recommends approval to accept this proposal and proceed with this project.

Note that Lunz Prebor Fowler (LPF) is the AE for this project, and their task order was approved on October 23, 2012.

---



EXCELLENCE IS OUR SIGNATURE

November 13, 2012

Mr. Scott Cottrell  
Public Works Director  
Sumter County  
319 E. Anderson St.  
Bushnell, FL 33513

Re: Public Works North Annex  
Construction Management Service Fee Proposal

Dear Scott:

ZHA is pleased to provide this proposal for Construction Management Services in accordance with the Facilities Development Task Order November – 2012 – 11. The general scope of work will be to provide Sumter County with Design Phase Services, RFP Phase Services and Construction Phase Services associated with the design and construction of the Public Works North Annex as delineated in Sections A, B and C of the Task Order.

Based upon the tasks described in the Task Order, the fees to accomplish the work will be billed on hourly monthly basis, with the cost of reimbursable items to be billed at direct cost. For the purposes of this fee proposal, the Not-to-Exceed fees were generated based on the man-hour forecast schedule and the hourly rates attached. The hours estimated to complete the tasks are based upon the durations stipulated in the schedule provided by the County, normal working hours and conditions, and do not include exhaustive negotiations of contracts, change orders or issues in dispute. Changes in the scope requested by County will be identified by ZHA and provided to the County as a proposed change of scope for their review and approval. Any change in fee will be in writing and approved by both parties. The fee is as follows:

|  |                  |
|--|------------------|
| <b>Task A</b> Design Phase               | \$2,975          |
| <b>Task B</b> Request for Proposal Phase | \$3,849          |
| <b>Task C</b> Construction Phase         | <u>\$15,943</u>  |
| <b>SUBTOTAL LABOR FEE</b>                | <b>\$22,767</b>  |
| <br>Estimated Reimbursable Expenses      | <br><u>\$735</u> |
| <b>TOTAL N-T-E FEE</b>                   | <b>\$23,502</b>  |

On or about the tenth day of each month during the term of this Agreement, ZHA will invoice the County in accordance with the monthly fees identified on the man-hour schedule.

ZHA will also include in its monthly invoices to the County all of ZHA's actual printing, postage, toll call, travel and cell phone expenses reasonably incurred in providing services during the preceding month. Expenses outside the scope of work, such as presentation materials, will be invoiced at their direct cost.

This Agreement will expire when the services are completed and ZHA's final invoice is paid in full. The County may add Additional Services to this Agreement based on an agreed upon Scope of Services and fees.

**DURATION**

It is anticipated that the project will start with approval at November 27, 2012 BOCC meeting and the design and construction, including close out will be completed by October 31, 2013.

ZHA appreciates the opportunity to provide this proposal and we look forward to working with County government officials, staff and the public to complete the assignment. If you have any questions concerning this proposal, please do not hesitate to contact me.

Sincerely,

A handwritten signature in blue ink, appearing to read "F. Mellin, Jr.", written in a cursive style.

Frederick J. Mellin, Jr.  
President/COO

**Sumter County  
Public Works North Annex  
Manpower Schedule  
November 13, 2012**

| 2012 HOURS                |        |      |      |      |      |      |      |      |      |      | Design Start |        | TOTAL    |
|---------------------------|--------|------|------|------|------|------|------|------|------|------|--------------|--------|----------|
| ROLE                      | JAN    | FEB  | MAR  | APR  | MAY  | JUN  | JUL  | AUG  | SEP  | OCT  | NOV          | DEC    |          |
| <b>Office Staff</b>       |        |      |      |      |      |      |      |      |      |      |              |        |          |
| Program Manager           | \$ 155 |      |      |      |      |      |      |      |      |      |              |        |          |
| Project Manager (Design)  | \$ 135 |      |      |      |      |      |      |      |      |      | 4            | 4      | 8        |
| Architect/Engineer        | \$ 130 |      |      |      |      |      |      |      |      |      |              |        |          |
| Sr. Sched./Cost Eng.      | \$ 110 |      |      |      |      |      |      |      |      |      |              |        |          |
| Admin. Assistant          | \$ 67  |      |      |      |      |      |      |      |      |      |              | 2      | 2        |
| <b>Subtotal</b>           |        |      |      |      |      |      |      |      |      |      | 4            | 6      | 10       |
| <b>Field Staff</b>        |        |      |      |      |      |      |      |      |      |      |              |        |          |
| Project Manager (Constr.) | \$ 135 |      |      |      |      |      |      |      |      |      |              |        |          |
| Office Eng.               | \$ 110 |      |      |      |      |      |      |      |      |      |              |        |          |
| Sr. Inspector             | \$ 105 |      |      |      |      |      |      |      |      |      |              |        |          |
| Inspector                 | \$ 85  |      |      |      |      |      |      |      |      |      |              |        |          |
| Safety/Code Specialist    | \$ 115 |      |      |      |      |      |      |      |      |      |              |        |          |
| <b>Subtotal</b>           |        |      |      |      |      |      |      |      |      |      |              |        |          |
| <b>TOTAL</b>              |        |      |      |      |      |      |      |      |      |      | 4            | 6      | 10       |
| Monthly Fee               | \$ -   | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 541       | \$ 676 | \$ 1,217 |
| Monthly Expenses          | \$ -   | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 10        | \$ 10  | \$ 20    |
| Monthly Total             | \$ -   | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 551       | \$ 686 | \$ 1,237 |

| 2013 HOURS                |        |          |          |          |          |          |          |          |          |           | Design Complete | Bid, Permit & GC Award | Construction Start | Construction Complete | Closeout | TOTAL |
|---------------------------|--------|----------|----------|----------|----------|----------|----------|----------|----------|-----------|-----------------|------------------------|--------------------|-----------------------|----------|-------|
| ROLE                      | JAN    | FEB      | MAR      | APR      | MAY      | JUN      | JUL      | AUG      | SEP      | OCT       | NOV             | DEC                    |                    |                       |          |       |
| <b>Office Staff</b>       |        |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| Program Manager           | \$ 155 |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| Project Manager (Design)  | \$ 135 | 4        | 8        | 8        | 8        | 2        | 2        | 2        | 2        | 2         |                 |                        | 40                 |                       |          |       |
| Architect/Engineer        | \$ 130 |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| Sr. Sched./Cost Eng.      | \$ 110 |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| Admin. Assistant          | \$ 67  |          | 2        |          |          |          |          |          |          |           |                 |                        | 2                  |                       |          |       |
| <b>Subtotal</b>           |        | 4        | 10       | 8        | 8        | 2        | 2        | 2        | 2        | 2         |                 |                        | 42                 |                       |          |       |
| <b>Field Staff</b>        |        |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| Project Manager (Constr.) | \$ 135 |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| Office Eng.               | \$ 110 |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| Sr. Inspector             | \$ 105 |          |          | 8        | 8        | 24       | 24       | 24       | 24       | 24        |                 | 16                     | 152                |                       |          |       |
| Inspector                 | \$ 85  |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| Safety/Code Specialist    | \$ 115 |          |          |          |          |          |          |          |          |           |                 |                        |                    |                       |          |       |
| <b>Subtotal</b>           |        |          |          | 8        | 8        | 24       | 24       | 24       | 24       | 24        |                 | 16                     | 152                |                       |          |       |
| <b>TOTAL</b>              |        | 4        | 10       | 16       | 16       | 26       | 26       | 26       | 26       | 26        |                 | 18                     | 194                |                       |          |       |
| Monthly Fee               | \$ 541 | \$ 1,217 | \$ 1,925 | \$ 1,925 | \$ 2,798 | \$ 2,798 | \$ 2,798 | \$ 2,798 | \$ 2,798 | \$ 2,798  | \$ 1,955        | \$ -                   | \$ 21,550          |                       |          |       |
| Monthly Expenses          | \$ 10  | \$ 10    | \$ 10    | \$ 10    | \$ 113   | \$ 113   | \$ 113   | \$ 113   | \$ 113   | \$ 113    | \$ 113          | \$ -                   | \$ 715             |                       |          |       |
| Monthly Total             | \$ 551 | \$ 1,227 | \$ 1,935 | \$ 1,935 | \$ 2,910 | \$ 2,910 | \$ 2,910 | \$ 2,910 | \$ 2,910 | \$ 2,910  | \$ 2,068        | \$ -                   | \$ 22,265          |                       |          |       |
|                           |        | \$ 2,975 |          | \$ 3,849 |          |          |          |          |          | \$ 15,943 |                 |                        |                    |                       |          |       |

Sumter County  
Public Works North Annex  
Manpower Schedule  
November 13, 2012

**TOTAL HOURS**

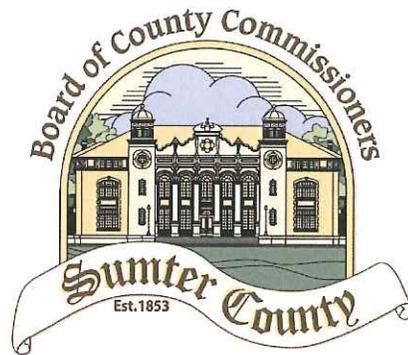
| ROLE                      | 2012      | 2013       | 2014     | 2015     | Total      |
|---------------------------|-----------|------------|----------|----------|------------|
| <b>Office Staff</b>       |           |            |          |          |            |
| Program Manager           | -         | -          | -        | -        | -          |
| Project Manager (Design)  | 8         | 40         | -        | -        | 48         |
| Architect/Engineer        | -         | -          | -        | -        | -          |
| Sr. Sched./Cost Eng.      | -         | -          | -        | -        | -          |
| Admin. Assistant          | 2         | 2          | -        | -        | 4          |
| <b>Subtotal</b>           | <b>10</b> | <b>42</b>  | <b>-</b> | <b>-</b> | <b>52</b>  |
| <b>Field Staff</b>        |           |            |          |          |            |
| Project Manager (Constr.) | -         | -          | -        | -        | -          |
| Office Eng.               | -         | -          | -        | -        | -          |
| Sr. Inspector             | -         | 152        | -        | -        | 152        |
| Inspector                 | -         | -          | -        | -        | -          |
| Safety/Code Specialist    | -         | -          | -        | -        | -          |
| <b>Subtotal</b>           | <b>-</b>  | <b>152</b> | <b>-</b> | <b>-</b> | <b>152</b> |
| <b>TOTAL</b>              | <b>10</b> | <b>194</b> | <b>-</b> | <b>-</b> | <b>204</b> |

|                        |          |           |      |      |           |
|------------------------|----------|-----------|------|------|-----------|
| <b>Annual Fee</b>      | \$ 1,217 | \$ 21,550 | \$ - | \$ - | \$ 22,767 |
| <b>Annual Expenses</b> | \$ 20    | \$ 715    | \$ - | \$ - | \$ 735    |
| <b>Annual Total</b>    | \$ 1,237 | \$ 22,265 | \$ - | \$ - | \$ 23,502 |

**TOTAL FEE**

| ROLE                      | 2012            | 2013             | 2014        | 2015        | Total            |
|---------------------------|-----------------|------------------|-------------|-------------|------------------|
| <b>Office Staff</b>       |                 |                  |             |             |                  |
| Program Manager           | \$ -            | \$ -             | \$ -        | \$ -        | \$ -             |
| Project Manager (Design)  | \$ 1,082        | \$ 5,412         | \$ -        | \$ -        | \$ 6,494         |
| Architect/Engineer        | \$ -            | \$ -             | \$ -        | \$ -        | \$ -             |
| Sr. Sched./Cost Eng.      | \$ -            | \$ -             | \$ -        | \$ -        | \$ -             |
| Admin. Assistant          | \$ 135          | \$ 135           | \$ -        | \$ -        | \$ 269           |
| <b>Subtotal</b>           | <b>\$ 1,217</b> | <b>\$ 5,546</b>  | <b>\$ -</b> | <b>\$ -</b> | <b>\$ 6,763</b>  |
| <b>Field Staff</b>        |                 |                  |             |             |                  |
| Project Manager (Constr.) | \$ -            | \$ -             | \$ -        | \$ -        | \$ -             |
| Office Eng.               | \$ -            | \$ -             | \$ -        | \$ -        | \$ -             |
| Sr. Inspector             | \$ -            | \$ 16,004        | \$ -        | \$ -        | \$ 16,004        |
| Inspector                 | \$ -            | \$ -             | \$ -        | \$ -        | \$ -             |
| Safety/Code Specialist    | \$ -            | \$ -             | \$ -        | \$ -        | \$ -             |
| <b>Subtotal</b>           | <b>\$ -</b>     | <b>\$ 16,004</b> | <b>\$ -</b> | <b>\$ -</b> | <b>\$ 16,004</b> |
| <b>TOTAL</b>              | <b>\$ 1,217</b> | <b>\$ 21,550</b> | <b>\$ -</b> | <b>\$ -</b> | <b>\$ 22,767</b> |

# Facilities Development



319 E Anderson Avenue • Bushnell, FL 33513 • Phone (352) 569-1530  
Website <http://sumtercountyfl.gov>

## FACILITIES DEVELOPMENT TASK ORDER FORM FOR ZHA – CONSTRUCTION MANAGEMENT SERVICE

### FD- TASK ORDER NOVEMBER – 2012 – 11

DATE – November 13, 2012  
PROJECT – PUBLIC WORKS NORTH ANNEX  
ISSUED BY: ANNETTE FITZPATRICK

#### PROPOSED SCOPE OF WORK:

ZHA shall provide all materials, labor, equipment, and supervision necessary to achieve the completion of this task order.

The general scope of work will be to provide Sumter County with Design Phase Services, RFP Phase Services, Construction Phase Services associated with the design and construction of the Public Works North Annex.

#### A) Design Phase Services

- 1) Review construction documents and make recommendations with respect to the selection of building systems, components, materials and equipment in terms of which is most cost effective.
- 2) Make recommendations with respect to life cycle cost of the building systems, components, materials and equipment.
- 3) Review all fixtures, equipment, door \ hardware, windows and room finish schedules for completeness.
- 4) Make recommendations with regards to any apparent defect in the design; determine if there are any conflicts between various trades.
- 5) Determine if there are any missing scope gaps between the various trades.

Bradley S. Arnold,  
County Administrator  
(352) 689-4400  
7375 Powell Road  
Wildwood, FL 34785

Richard "Dick" Hoffman, Dist 1  
(352) 689-4400  
7375 Powell Road  
Wildwood, FL 34785

Doug Gilpin, Dist 2  
2<sup>nd</sup> Vice Chairman  
(352) 689-4400  
7375 Powell Road  
Wildwood, FL 34785

Don Burgess, Dist 3  
Chairman  
(352) 689-4400  
7375 Powell Road  
Wildwood, FL 34785

Garry Breeden, Dist 4  
Vice Chairman  
(352) 689-4400  
7375 Powell Road  
Wildwood, FL 34785

Randy Mask, Dist 5  
Office: (352) 689-4400  
Home: (352) 793-3930  
7375 Powell Road  
Wildwood, FL 34785

- 6) Review documents for building code and zoning compliance and all other regulatory agencies having jurisdiction over the project.
- 7) Assist County with the development of a project CPM construction schedule.
- 8) Provide probable cost estimate and compare to project budget.

#### B) Request for Proposal (Contractor) Phase Services

- 1) Review of bid \ RFP documents for completeness.
- 2) Review of unresolved issues from bids/proposals and providing recommendations on resolution.
- 3) Assist the county and architect with any RFI or document interpretations or clarifications during the RFP process.
- 4) Provide evaluation with request for “product substitutions” during the RFP process.
- 5) Assist with pre-bid conference (if documents require this activity).
- 6) Assist county with evaluation of proposal once they have been received.
- 7) Assist county with evaluation of the construction CPM schedule.

#### C) Construction Phase Services

1. Review and update project schedules.
2. Follow system of routing for project correspondence and submittals.
3. Contract administration and site observation responsibilities.
4. Notify the consultant of selected prime contractor(s) and subcontractors when directed.
5. Obtain and review Contractor’s submittal schedule; confirm with architect that contractor’s schedule can be met.
6. Establish a time for a preconstruction meeting.
7. Establish site observation and project meeting schedules; coordinate inspection requirements.
8. Assist in submitting applications for permanent gas, electric, water, telephone and other services.
9. Tracking of project costs to budget available.
10. Verify each month that the contractor and subcontractor are properly updating the as-builts documents.
11. Evaluate contractor CPM construction schedule each month, necessary to maintain contract completion date, if schedule should slip, provide notification for a “recovery schedule” which will delineate how the contract completion date will be achieved.
12. Advise the county of any building code inspection which are substandard or which were failed.

13. Maintain all test reports for the project as required by the construction documents.
14. Inform Project Manager of progress of projects. Prepare field report of site visits.
15. Prior to first application for payment, receive, review and recommend approval, if appropriate, Contractor's schedule of values.
16. Receive and review the Contractor's application for payment with architect.
17. Verify requirements, if any, for reduction in retainage and have Contractor submit consent of surety documentation.
18. Obtain and review required test reports.
19. Receive contractor's submittal log and monitor the response time from the architect.
20. Review Contractor's proposed cost for changes and recommend response.
21. Respond to the Contractor's punch list of remaining work to be repaired or completed.
22. Ensure reproducible record drawings are received from the Contractor and review for accuracy.
23. Review project close-out documents for completeness and accuracy, to include but not limited to as-builts, shop drawings, operations and maintenance manuals and warranties.
24. Verify the Contractor has obtained a certificate of occupancy or occupancy permit.
25. Review the Contractor's request for final inspection and conduct a field inspection of the project to confirm completion.
26. Prepare final field report.
27. Review the Contractor's application for final payment, including required attachments such as waivers of lien and consent of surety documentation.
28. Review and make recommendation on request for final payment.
29. Assemble and file for future reference complete project and cost records for both construction and professional services.
30. Archive project information and materials.