



# City of Miami

## Department of Capital Improvement Program

### Instructions and Procedures for Completing a Consultant Work Order Proposal

#### Overview

Consultants currently under contract with the City of Miami (City), Department of Capital Improvements Program (CIP) for the provision of Miscellaneous Consultant Services may be request by CIP to submit a Work Order Proposal (Proposal) for a Project. At the time of requesting a Proposal the CIP Project Manager will provide a timeframe for submission of the Proposal. The Consultant shall follow these instructions for the completion and submission of a Proposal. CIP reserved the right to cancel the request for a Proposal at any time, including the Consultant's failure to timely submit the Proposal.

All Proposals for an initial project award and supplemental services must use the City forms. No alterations of the form will be accepted without the prior written consent of CIP and any deviation from these instruction and procedures will result in delays or rejection of the Proposal.

While the contracts contain a specified contract term, a contract will remain in effect if a project has been awarded prior to the expiration of the contract. Where such a situation exists work orders will only be approved for supplemental services. No new projects will be awarded.

Should you have any questions concerning these procedures please send an e-mail to [BDoyle@miamigov.com](mailto:BDoyle@miamigov.com) (for Consultants whose names are from A-I or Cecelia Wilson for the Consultants whose names are from J-Z).

Compliance with these instructions and procedures will assist CIP in expediting the award of Projects.

The City may at its sole discretion reject a Proposal and request that another consultant submit a Proposal for the Project.

The forms and these instructions are available by visiting <http://www.miamigov.com/capitalimprovements/pages/ProcurementOpportunities/ProjectPages/Forms.asp>

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## Completion of Work Order Proposal

The Proposal contains two parts. The 1<sup>st</sup> is the letter and the 2<sup>nd</sup> is the spreadsheets. When submitting the Proposal to CIP the Proposal must contain both parts. The 1<sup>st</sup> part contains nine (9) sections, which must be completed as follows:

### Part 1

#### Section I-General

This Section is to include a narrative description of the project and the specific tasks to be performed as part of the project, including but not limited to:

- Design
- Construction Administration
- Post Design Services
- Post Completion Services
- Survey
- Testing
- Study
- Feasibility or other analysis
- Construction Engineering and Observation Services

#### Section II-Scope of Work

This Section is to include in outline and narrative form a detailed description of the task, sub-task, or activity (Deliverables) to be performed under this Proposal. This section is to clearly identify any services task, activity, or deliverable that is being performed differently than what is stipulated in the contract. In addition, this section is to clearly identify what tasks that are contained in the contract, which are not included in the scope of work.

#### Section III-Sub-Consultants

The Consultant must list all Sub-Consultants that will be utilized on this Project. **If any of the Sub-Consultants are not included under the executed contract the Consultant must submit a letter to the Assistant Director-Contracts requesting that the firm be added to the contract.** This letter must include, at a minimum, the name and address of the firm, the professional services the firm will provide and the classification and unburdened (raw) rates to be charged for each classification. The City may require, where it determines that names be provided for classification where it determines that the individual will fall within the Key Personnel provision of the contract. Failure to submit this letter or the required supporting information will either delay process of the Proposal or may result in rejection of the Proposal.

#### Section IV-Schedule of Work

The Deliverables identified in Section II must have a corresponding duration and delivery date assigned to them, which is to be reflected in this Section.

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The duration must be stated in weeks or calendar days and the delivery date is to be based on the date the Notice to Proceed (NTP) is issued. These Deliverables are to be listed in sequential order and the NTP delivery dates are to be cumulative. For example:

<b>SCHEDULE OF DELIVERABLES</b>			
<b>Task, Sub-task, or Activity ID #</b>	<b>Major Task, Sub-Task, Activity, or Deliverable</b>	<b>Duration (specify weeks or calendar days)</b>	<b>Delivery Date* (cumulative weeks, or calendar days)</b>
1	Development of Objectives	20 days	NTP + 20 days
	Schematic Design	30 days	NTP +50 days
	Design Development	6 weeks	NTP +92 days

### Section V-Compensation

This section is to include the method of compensation, which may include; lump sum, lump sum not to exceed, guaranteed maximum price, time, time and materials. The Consultant is to identify the cost for the basic services as well as a proposed budget for Reimbursable Expenses. The City will ultimately determine the budget for Reimbursable Expenses. The Summary of Compensation table is to list the fee amount for each Deliverable. It is important to ensure that this table and the Deliverables correspond.

### Section VI-Additional Services

The Consultant is to list services that are not included as part of the proposed basic services. This is to include those identified in Section II as well as any other services.

### Section VII-Data Provided by City of Miami

The Consultant is to provide a detailed list of data or other deliverables that it expects to receive from the City.

### Section VIII-Project Manager

The Consultant is to identify the Project Manager for this Project. This individual can only be changed with the prior written approval of CIP.

## **Part 2**

### Completion of Spreadsheets

The Consultant is to complete a spreadsheet for itself as well as for each Subconsultant. The Consultant's spreadsheet is to incorporate the proposed fee for each Subconsultant. The following information is also to be reflected on the spreadsheets:

- Work Activity
- Name of each position, corresponding personnel name and **raw** hourly rate

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- Number of man hours per activity per position
- Survey field days for surveying where the fee being charged is per crew. This information is to be entered in the Survey Field Days box.

Only include those positions that are identified in the contract together with their corresponding raw rates. Please refer to the contract to ensure not to include overhead positions in the PROPOSAL. In most instances clerical positions are overhead, as stated in the contract. **In instances where the Consultant needs to add positions or personnel a letter must be submitted to the Assistant Director-Contracts requesting that such positions be added.** This letter must also include the proposed raw rates for the positions or personnel. CIP may request additional information prior to making a decision on the request.

### Submission of Work Order Proposal

Upon completion of the PROPOSAL it is to be signed by an authorized individual or officer of the firm and then the PROPOSAL is to be submitted to the City's Project Manager who requested the PROPOSAL. CIP will review the PROPOSAL and advise the Consultant, if necessary, in writing of any revisions, additions, or deletions (Revisions) to be made to the PROPOSAL. The CIP Project Manager will also provide the Consultant with a timeframe for submitting the revised PROPOSAL. The Consultant is to only make the Revisions requested by the City and all such revisions are to be clearly highlighted on the PROPOSAL. Any other changes made by the Consultant will delay the review and approval of a PROPOSAL.

Upon acceptance of the PROPOSAL the Project Manager will prepare a Work Order for internal City approvals. Upon obtaining internal City approval a NTP will be issued.

### Common Mistakes found in Work Orders

Over the years CIP has routinely found that approval of PROPOSALS are delayed because the Work Order Proposal is not properly completed. The following are some of the typical issues we find together with how the Consultant should avoid them.

- Rates don't match contract rates.
  - Review rates in the contract before submitting proposal
  - If Consultant is increasing the rates base on the maximum annual increase permitted by the contract a separate letter must be submitted prior to the PROPOSAL requesting the rate increase. Retroactive rate increases will not be approved.
- Positions are not in the contract
  - Review personnel classifications in the contract before submitting proposal
- Rates don't match classifications
  - Review personnel classifications and rates in the contract before submitting proposal
- Subconsultant not under contract
  - A letter must be submitted requesting the addition of a Subconsultant. The letter should include:
    - Name, address and contact information
    - Personnel classifications and applicable unburdened hourly rates
    - Basis for adding Subconsultant

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- If the professional discipline is already under the contract the basis must state why the existing Subconsultant can not perform the work
- Deliverables and Compensation do not correspond
  - Review PROPOSAL to ensure they do correspond
- Addition of Terms and Conditions
  - No new or revised terms and conditions will be accepted